



UKG TeleStaff Manage and Administer Bidding

Manager Tasks and Outcomes

Exercise Workbook

Revision A





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 Scheduler Training: Manager Tasks and Outcomes
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About this Training

This training supplies the basic skills necessary to use the UKG TeleStaff™ Bidding feature. The training primarily follows Sabrina Smith, a bid administrator, and navigates through the steps of bidding, managing the bid, preparing a new bid and the steps for properly awarding and closing the bid.

Learning Objectives

After completing this course, the student can:

- Understand Bidding
 - Bidding Dashboard
 - Queue Bids
 - Preference Bids
 - Bid items
- Navigate the Bidding Page
 - Bidding Dashboard features
 - Bidding window
 - Bidding for self and others
- Manage Bids
 - Close the bid
 - Award the Bid
 - Export bid results
 - Prepare new bid

Training Database Log-in Credentials

Training exercises may use various personas in this training. The main persona for this class is Bid Administrator Sabrina Smith. The login credentials for Sabrina's TeleStaff profile are listed below.

Sabrina Smith

- User ID: SSmith
- Password: 1234

Note – Log in as any user using their first initial and last name as the User ID and 1234 as the password.



Bid Overview

What is Bidding?

Bidding assists organizations as they fairly distribute items amongst their employees. Biddable items include vacation time, permanent assignment locations, shifts, and working opportunities.

Why do organizations choose the bidding feature?

- Centralized tool to manage bid processes.
- Empowers employees to directly bid for desired positions or leave, creating a more flexible scheduling environment.
- Employees are given more control over their schedules and have improved tracking capabilities during the bidding process.
- Enforces organization rules by ensuring a fair and transparent bidding process.
- Each type of bid provides distinctly different, user-friendly processes for recording bids within the system with assurance that bids are managed in accordance to established organization procedures.

Bidding benefits include:

- Saves time.
- Eliminates errors, accurately enforcing policies.
- Automates data entry.
- Centralize bidding tool; all records and results easily exported to saved files.
- Provides transparency and ensures fairness throughout the entire bid process from beginning to end.
- Quicker results and greater flexibility for the employees including smartphone compatibility.

What scheduling items may be optioned for a bid?

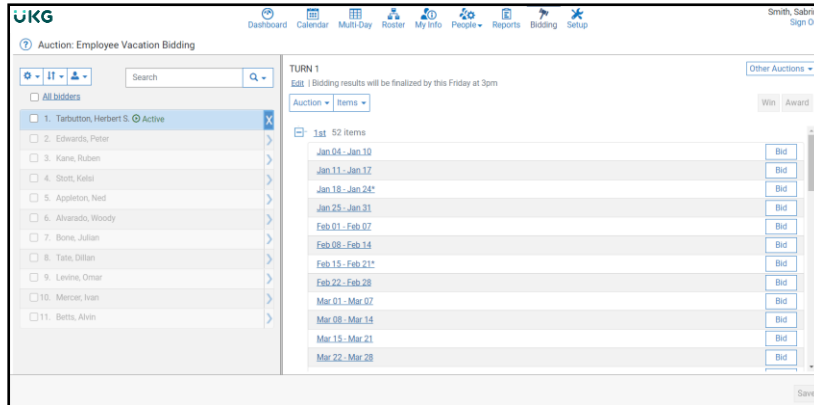
- Vacation/PTO
 - Creates leave work code on the calendar on awarded dates
 - Single dates
 - Range of dates
- Position
 - Creates a new assignment
 - Area
 - Shift
 - Shift with shift mask
- Work opportunities
 - Roster bid for overtime/extra duty opportunities

Bid Strategy

There are two types of bid strategies, Queue and Preference. Organizations with multiple buds may use one or both bid strategies to fulfill their needs.

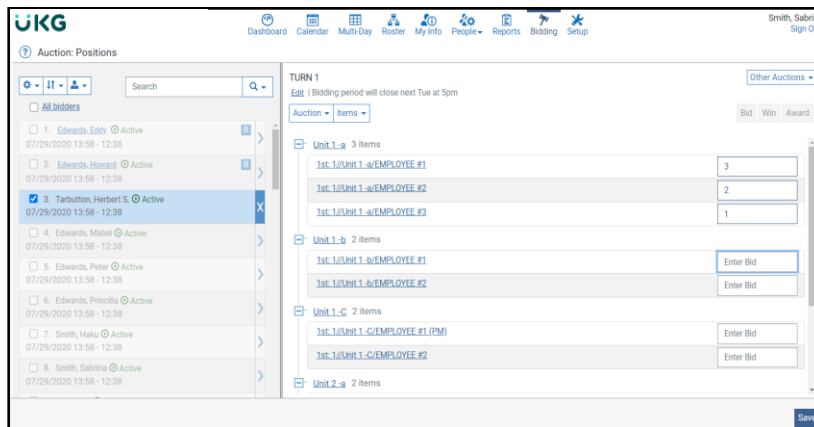
Queue Method

A **Queue** style bid consists of a list of bidders sorted in a specified manner, often defined by hierarchy. Seniority factors, such as hire date, promotion date, or test scores, are common sort criteria. Bidding occurs with the most senior bidder making their selections first and once completed, the next bidder becomes active allowing them to make their selections. This process continues down the queue of bidders.



Preference Method

In a **Preference** style bid each bidder designates their bid item choices by indicating a first choice, second choice, third choice, and so on. Bidders bid concurrently without having to wait for more senior bidders to make their selections. After all the bids are entered, TeleStaff calculates wins based on the defined rules.



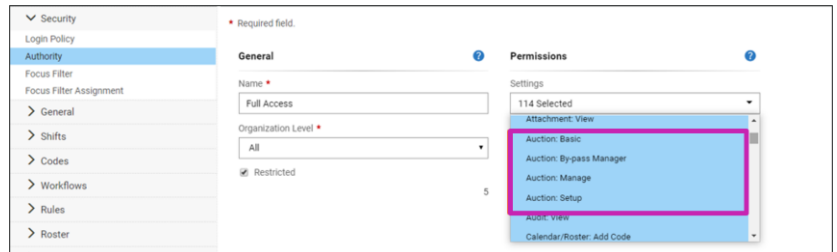
Bid Administrator Details

Bid Administrator Permissions

Employee access to the bid is determined by **Permissions**. For the typical end user, access is limited. One person, or a small handful of people, at the organization have bidding administrator access. In this training database, Sabrina Smith is the administrator and has access to view and modify details for all active bids in the database.

The bidding administrator has the following authorities to manage the bid:

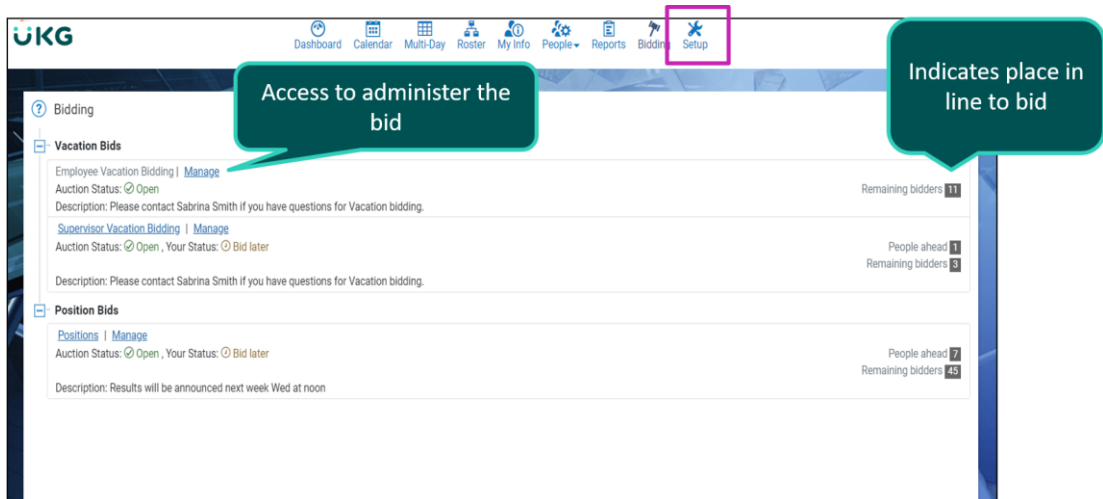
- **Auctions: Manage**
- **Auctions: Setup**
- **Auction: By-pass Manager**



Bid Dashboard Overview

Navigate to **Bidding** in the navigator. Details for each bid are listed, including the name and status of the bid. The bid details list if the bid is open for bidding, and if it is the user's turn to bid. A unique description is optionally displayed below the name of the bid.

The page lists the number of bidders ahead of the logged in user are listed and how many total bidders remain before bidding is complete. Employees eligible to bid only see the bid name hyperlink, while administrators see both the bid name and the manage hyperlink. Selecting **Manage** on the bidding dashboard provides administrator access settings for the bid.



Bid Window Overview

Selecting the **Manage** link opens the bid window with various selections for managing the bid and includes a panel with the bidders list (once created). The bidders list displays, alongside the items available to bid on.

The bid in this database allows employees to bid on a range of dates. Work code bids may be configured to bid on a single day or range of dates.

The screenshot shows the UKG Bidding interface for an 'Employee Vacation Bidding' auction. On the left, a list of bidders is shown, with Herbert S. Tarbutton selected. On the right, a table lists available bid items with their respective date ranges and remaining counts. Two callout boxes provide instructions: one points to the right arrow next to the selected bidder, and the other points to the 'Bid' button in the table.

Item	Remaining
Jan 04 - Jan 10	3/3
Jan 11 - Jan 17	3/3
Jan 18 - Jan 24*	3/3
Jan 25 - Jan 31	3/3
Feb 01 - Feb 07	3/3
Feb 08 - Feb 14	3/3
Feb 15 - Feb 21*	3/3
Feb 22 - Feb 28	3/3
Mar 01 - Mar 07	3/3
Mar 08 - Mar 14	3/3

Employee View

While there may be additional bids, TeleStaff has the option to limit which bid the employee can view on the employee's Bidding dashboard.

In this example, employee Tarbutton is limited to only view bids that apply to him. The employee has a queue method vacation bid (**Employee Vacation Bidding**) and a preference method position bid (**Positions**).

Selecting the bid name opens the corresponding bid. The employee view provides access to view and bid on available bid items. Navigate between accessible bids by selecting **Your Auctions**.

The screenshot shows the UKG Bidding interface from the perspective of employee Herbert S. Tarbutton. It displays two auction options: 'Employee Vacation Bidding' and 'Positions'. A callout box points to the 'Employee Vacation Bidding' link, stating 'Navigate to your other bids, such as Position bid.' Below, the 'Employee Vacation Bidding' auction is shown in detail, with a list of bid items and 'Bid' buttons. Two callout boxes provide instructions: one points to the date ranges in the table, and the other points to the 'Bid' buttons.

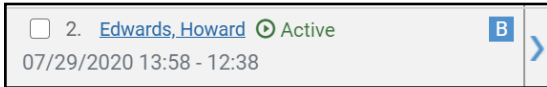
Item	Action
Jan 04 - Jan 10	Bid
Jan 11 - Jan 17	Bid
Jan 18 - Jan 24*	Bid
Jan 25 - Jan 31	Bid
Feb 01 - Feb 07	Bid
Feb 08 - Feb 14	Bid
Feb 15 - Feb 21*	Bid
Feb 22 - Feb 28	Bid
Mar 01 - Mar 07	Bid



Bid Phases

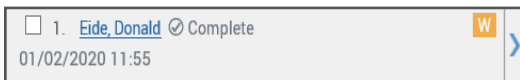
There are three phases of the bid process: **Bid**, **Win**, and **Award**. The three phases of bidding are indicated by a B (for bid), W (for win) and A (for award) on the bidder's list.

Bid Phase: The bid phase is the active stage of bidding when employees place their bid selections.



Win Phase: The win phase (also referred to as the resolving phase) occurs after the bidding phase. This phase confirms the items won, but items are not yet created (awarded) in the bidder's calendar (Vacation/PTO bid), assignment (Position bid), or filled vacancy (Roster bid).

In a queue bid, the bid and win phases happen simultaneously and the status on a bid item displays a W upon saving. In a preference bid, a W is displayed for employees who have won the item. This happens after bids are resolved.



Award Phase: The final stage is the award phase. Bid items are secured and granted to the winners in this phase. For example, once the award phase is complete for a vacation bid, vacation codes are added to the bidder's calendar and on the roster. In a position bid, the bidder's assignment is updated. In a roster bid, the roster vacancies are filled with the winning bidder.



Bid Status in the Bidder's List

Selecting the bid item displays the details of the bid. Notice Betts, Edwards and Tarbutton won Jan 25-Jan 31 (and includes which turn the dates were won).

The screenshot shows the UKG bidding interface for an "Auction: Employee Vacation Bidding". The top navigation bar includes icons for Dashboard, Calendar, Multi-Day, Roster, My Info, People, Reports, Bidding, and Setup. The user "Smith, Sabrina" is signed out.

The left sidebar shows a list of bidders, with the first bidder, "1. Tarbutton, Herbert S. Complete", highlighted in a pink box. Below this, other bidders are listed, including Edwards, Peter, Kane, Ruben, Stott, Kelsi, Appleton, Ned, Alvarado, Woody, Bone, Julian, Tate, Dillian, Levine, Omar, Mercer, Ivan, and Betts, Alvin.

The main content area shows the details for the selected bid item, "Jan 25 - Jan 31 (Turn 1)", which is also highlighted in a pink box. The status is "TURN 2 CLOSED" and "Sold Out". The results table shows the following data:

Results	Total	Won	Remain
<ul style="list-style-type: none"> Betts, Alvin (Turn 2) Edwards, Peter (Turn 2) Tarbutton, Herbert S. (Turn 1) 	3	3	0
Audit Quantity			
Static Maximum Invoked			

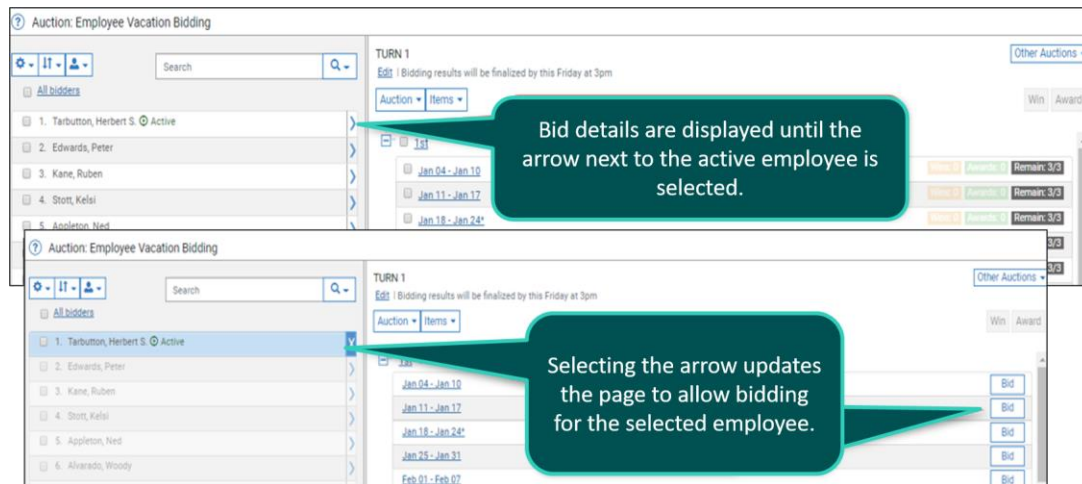
The right sidebar shows a list of other auctions, including "Jan 04 - Jan 10", "Jan 11 - Jan 17", "Jan 18 - Jan 24", "Feb 01 - Feb 07", "Feb 08 - Feb 14", "Feb 15 - Feb 21", and "Feb 22 - Feb 28". Each auction entry shows the number of wins, awards, and remaining items.

Let's Bid!

Introducing Queue Bidding

Queue method bidding requires employees to take turns, one by one, picking dates on the calendar. Each bidder can bid up to 2 items per turn and up to 4 total items for the entire bid.

Typically, a position bid is completed first, new assignments are added and then the vacation bid begins.



The **bidder's list** represents the employees qualified to bid. Tarbutton is first to bid, as they are the most senior. Sorting criteria is determined during configuration and is based on business policy. Tarbutton is listed as the only bidder with an active status. For the next person to bid, the Tarbutton bidder must bid, skip their turn, or not bid before bid time expires.

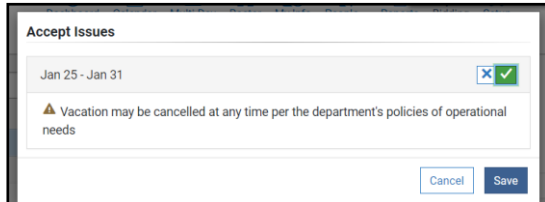
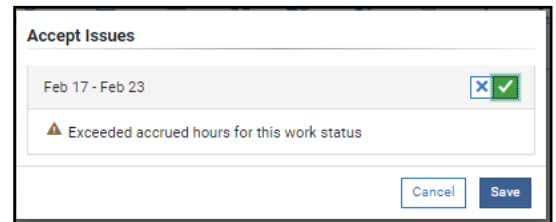
Note, the bid is paused until action is taken. Later in this class, implementing bid times demonstrates how to move the bid forward automatically with or without Tarbutton's response.

Bid administrators may also bid for employees. In this example, Sabrina Smith needs to enter bids for employee, Herbert Tarbutton. Selecting the arrow next to the employee's name allows Sabrina to view the bid just as Herbert views it. Next, Sabrina can make the bid selections by selecting **Bid** for each item, then selecting **Save** to complete Herbert's selections.

Dynamic and Static Issues

Some organizations prevent employees from bidding if their bid selection breaks a business or system policy. When issues are present, the system displays **Issues** and may prevent the employee from submitting their bid selections. Some issues serve as a warning or a disclaimer to the employee. Dynamic issues may be set up to inform or warn the bidder of a department's policy. The employee must acknowledge each warning before they can save their bids.

If the employee does not have enough accrued hours to take the leave, a static issue prevents an employee from saving the bid selection. The bid administrator typically has authority to bypass issues (as pictured).



Another common dynamic issue serves as a policy acknowledgement by the bidder when saving the bid.

Exercise 1 - Bid in a Queue Bid

Log into TeleStaff as Sabrina Smith, the bid administrator. The bid is generated, and the bidder's list is created.

1. Navigate to **Bidding**.
2. Select the **Manage** link for the **Employee Vacation Bidding**.
3. To activate the bid for the first employee, select the **arrow** next to the first person in the bidders list, Herbert Tarbutton.
 - a. Select the **Bid** for the first bid item.
 - b. Note the caution symbol on the Bid selection. Hover to view the dynamic issue.
4. Select Save and the **Accept Issues** window opens.
 - a. Select the checkmark to acknowledge the issue.
 - b. Select **Save**.
5. Complete the process for the remaining employees in the bidder's list. Select and Save bid items at random.

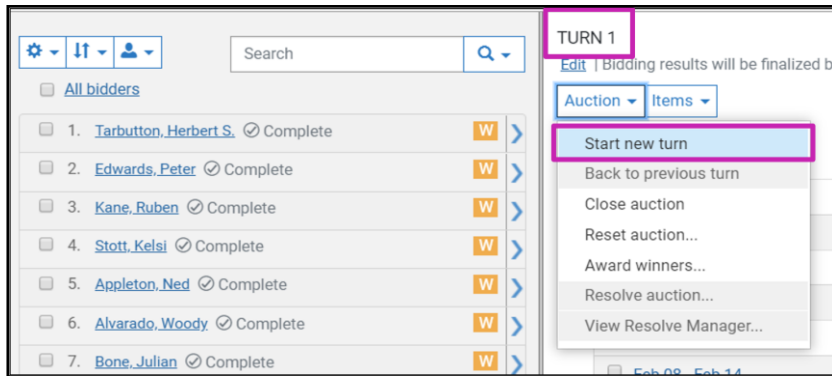
Start a New Turn / Back to Previous Turn

Bids may be configured to have multiple **turns** or rounds. In a multi-turn bid, the bid goes through the list one time and everyone bids. Bidders may choose a specified number of bid choices before moving on to the next bidder. After each employee has the chance to bid, the round ends and a second turn begins.

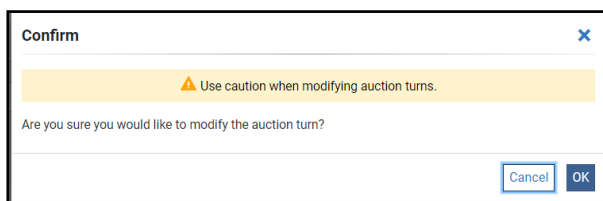
Turns help evenly distribute bid items by preventing the first few bidders from taking the most desirable leave dates or assignment selections. Starting a new turn ends the current turn and the next round starts the bidding at the top of the bidder's list. In a queue style bid, the bid administrator manually starts the next turn. In a preference style bid, TeleStaff automatically starts and ends the subsequent turns.

Note: If a new turn begins before bidders complete the bid, bidders who have not had an opportunity to bid are locked out of the previous round and do not have the ability to bid on items from the previous turn.

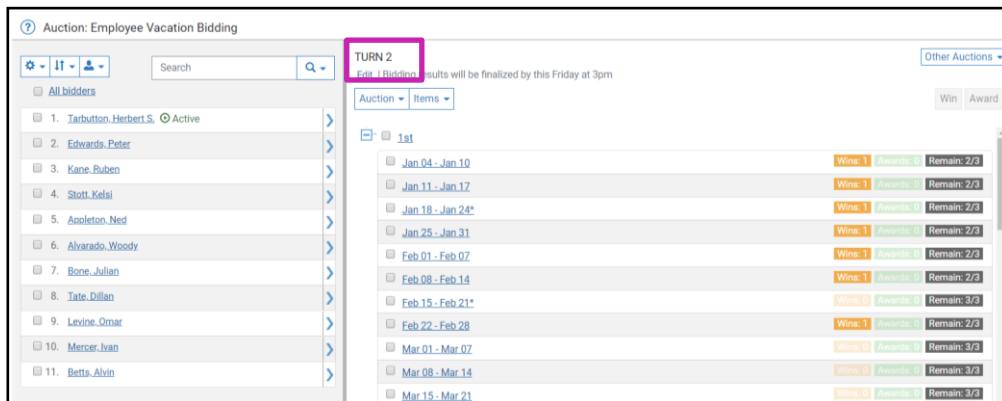
Start a new turn by selecting the **Auction** dropdown and choosing **Start new turn**.



Select **OK** to confirm starting a new turn.



The number of the turn is listed on the bid screen.



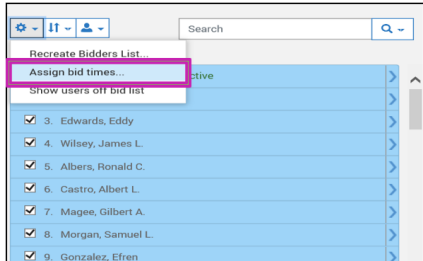
Exercise 2 - Start a New Turn

1. Navigate to the **Employee Vacation Bidding** by selecting the **Manage** hyperlink.
2. Select the **Auction** menu.
3. Select **Start new turn**.
4. Select **OK**.
5. Notice the Bidding window is labeled **Turn 2**.

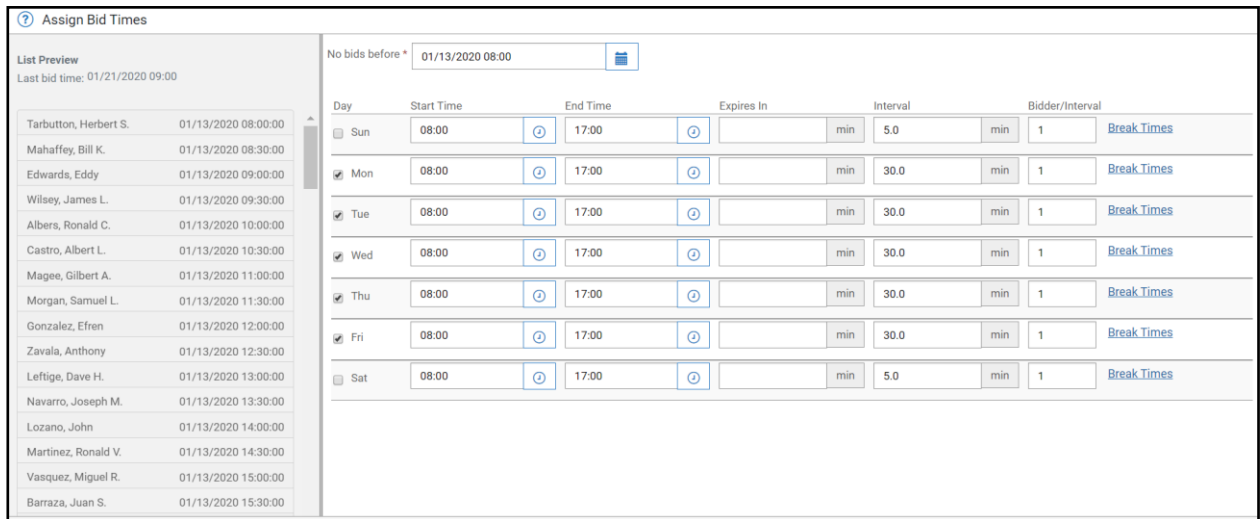
Set Bid Times

In a queue style bid, only the first bidder has an active status. Unless bid times are enabled, no one can bid until the bidder bids or skips their turn. Setting bid times ensures the bid continues progressing without being halted. **Assign Bid Times** designates a time for each employee to place their bids.

Select all bidders in the list and select the gear icon. Select **Assign bid times...**



The **Assign Bid Times** window opens. In the **No bids before*** calendar menu, enter date and time bidding starts. The start time entered is the bid time for the first employee in the list. The **List Preview** pane displays the time each employee bids. As time parameters are modified in this window, the list preview displays the changes.



The parameters in this window define how the bid operates. Considerations include which days and times the bid is active and how long the bid is reserved for a bidder.

Assign Bid Times fields are defined below:

- **Day:** Select which days of the week bidders may potentially bid on. Checking the box means bidders can bid on this day.
- **Start Time:** Defines the start time for bidding for the day.
- **End Time:** Defines the end time for bidding for the day.
- **Expires In:** Sets the maximum number of minutes each bidder is allotted to bid.
- **Interval:** Sets the number of minutes to elapse after each calculated bid time. This is the amount of time each bidder is granted exclusive access to bid.
- **Bidder Per Interval:** Sets the number of bidders assigned for each calculated bid time. For example: If this value is set to one, then each selected bidder in the queue list is calculated a unique bid time. If this value is set to a number greater than one; for example, three, then three bidders have the

same bid time before a subsequent bid time is calculated. Three bidders can simultaneously bid for auction items.

- **Break Times:** Set break times for the applicable day. Bid times are calculated around breaks.

When the employee’s turn activates, a notification is generated in the contact log upon login. TeleStaff may also generate a notification via email.

Action	Type	For	Contact	Status	Description	Date	On	Shift	List	Work Code	Start	End	Hours	By	Initiated	Expires	Listened To	Reserved	
	Message	Edwards Eddy	949-300-7897	Lacks Targeted Contact Method	You are now an active bidder in auction: Employee Vacation Periods	12/27/2019	2019-12-27 06:08:20							Smith, Sabrina A.	2019-12-27 06:07:26	2019-12-27 23:59:00			2019-12-27 23:59:00

The employee’s bidding dashboard displays their bid time and how many people are ahead of them in the bid.

Bidding

[Employee Vacation Bidding](#)

Auction Status: Open , Your Status: Bid later [10/01 08:00]

People ahead **1**

Description: Please contact Sabrina Smith if you have any questions for vacation bidding.

If bid times are not set, the progression of the bid is dependent upon bid activity. The employee sees a status of “**Bid later**” until it is their turn. Employees can review how many people are ahead of them to gauge when they should log back in.

Note - when the employee’s bid time expires, the system moves on to the next bidder.

Exercise 3 - Set Bid Times

1. Navigate to the **Employee Vacation Bidding** by selecting the **Manage** hyperlink.
2. In the Bidders List pane, select the box for **All bidders**.
3. Select the **gear** dropdown and select **Assign bid times...**
4. Enter today’s date @ 08:00:00 in the **No bid before date selector**.
5. To prevent bidding over the weekend, select Sunday and Saturday.
6. Review the **List Preview** panel to see the system calculated bid times for each bidder.
7. Select **Save**.

NOTE: Recreating the bidders list is an easy method to remove the bid times

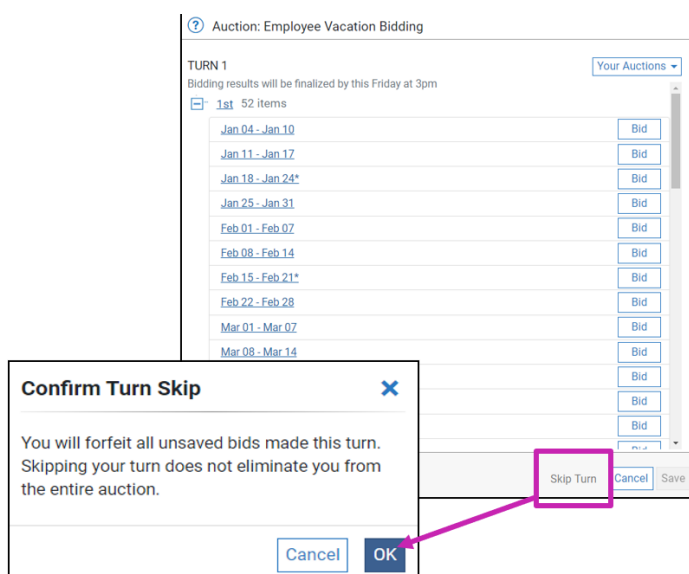
Skip Turns

Some organizations allow employees to skip their bid turn using the **Skip Bidder's Turn** link. An employee cannot skip a turn until it is their turn to bid. It may be necessary for the bid administrator to skip the turn on behalf of the active bidder, ensuring the bid process continues to the next bidder.

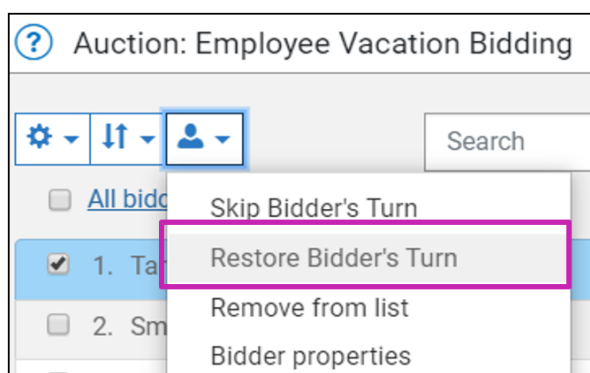
Skip turn parameters include:

- The bidder can skip a turn for the current round.
- There is no limit to the number of rounds a bidder chooses to skip.
- The bidder cannot skip a future round.

Employees use the **Skip Turn** link next to the **Save**.



Bid administrator skips for employee via **Bidders Actions** menu.

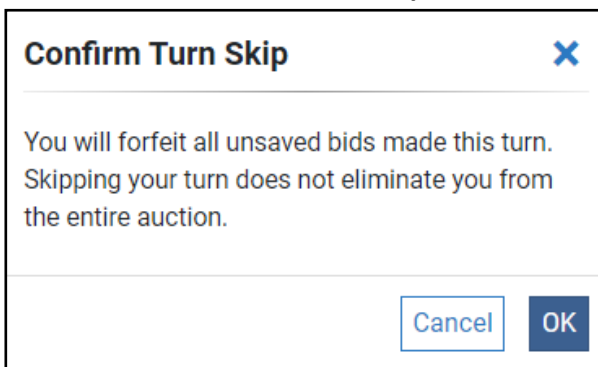


Exercise 4 - Skip Turn as Bid Administrator

1. Navigate to the **Employee Vacation Bidding** by selecting the **Manage** hyperlink.
2. Go to the Bidders List pane and select the box on the active bidder, Herbert Tarbutton.
3. Select the **Bidders Actions** dropdown (silhouette icon).
4. Select **Skip Bidder's Turn** to skip the current round for Tarbutton.
5. The bidder's status updates to **complete**.

Exercise 5 - Skip Turn as Employee

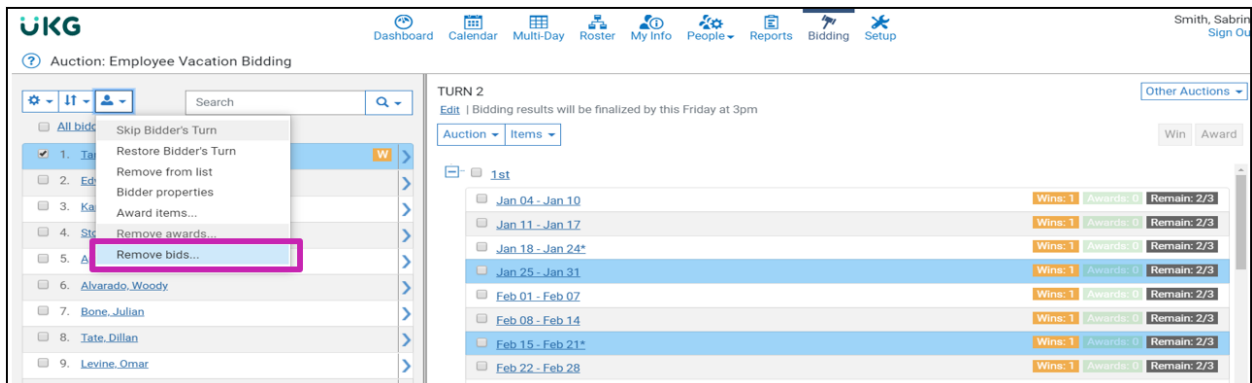
1. *Sign in as the next employee in the bidders list (Ruben Kane User ID- rkane). Navigate to the bid Employee Vacation Bidding.*
2. Select **Skip Turn**.
3. Select **OK** in the **Confirm Turn Skip** window.



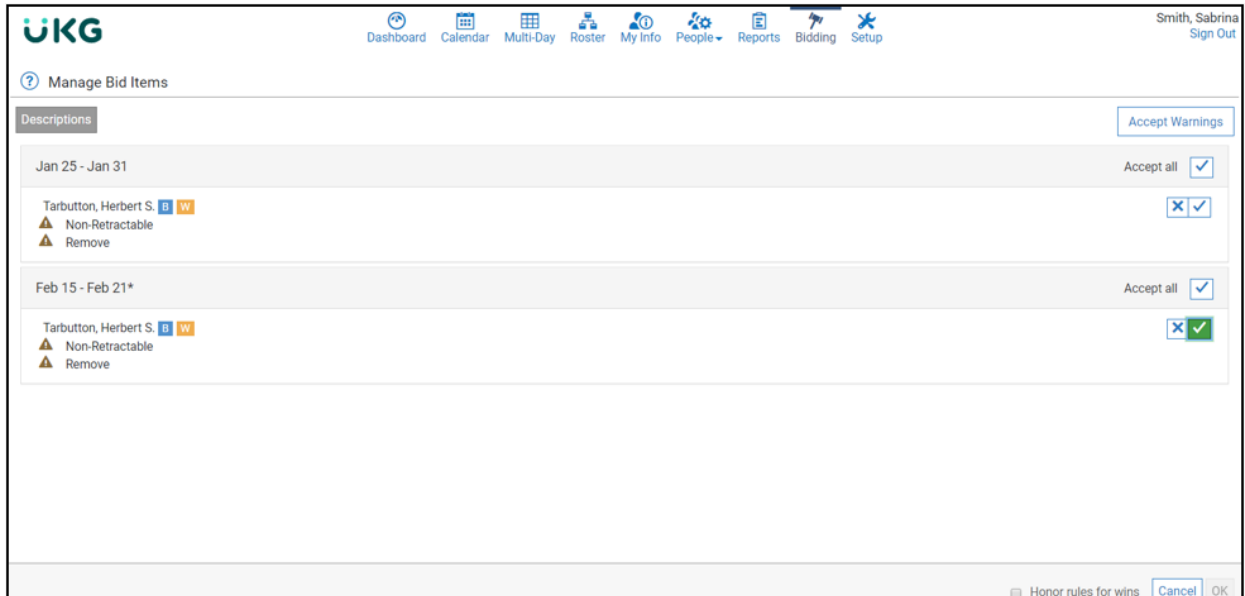
Correct Mistakes

During a queue bid, bidders cannot modify their bid after saving their bid selections and need to contact the bid administrator to correct mistakes. There are many ways to correct bid errors depending on how the bid is configured.

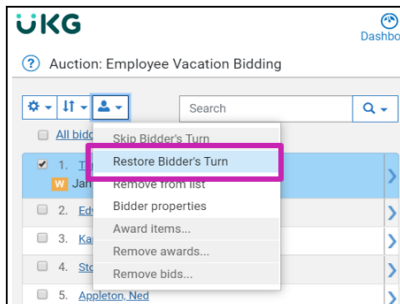
In this example, Tarbutton entered a bid and immediately. The bid administrator removes the bid by selecting the bidder box, selecting the box of the bid item(s) to remove, selecting **Items**, and choosing **Remove bids...**



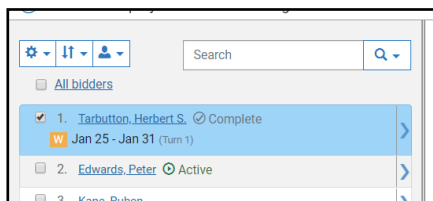
In the issues window, select the check to show which bids to remove. Select **OK**.



Restore the bidder's turn by checking the box next to the bidder. Select **Restore Bidder's Turn** from the person dropdown to start the turn again.



Tarbutton is now listed as completing the first turn and may bid the second turn.



Exercise 6 – Retract a Bid and Restore a Bidder's Turn

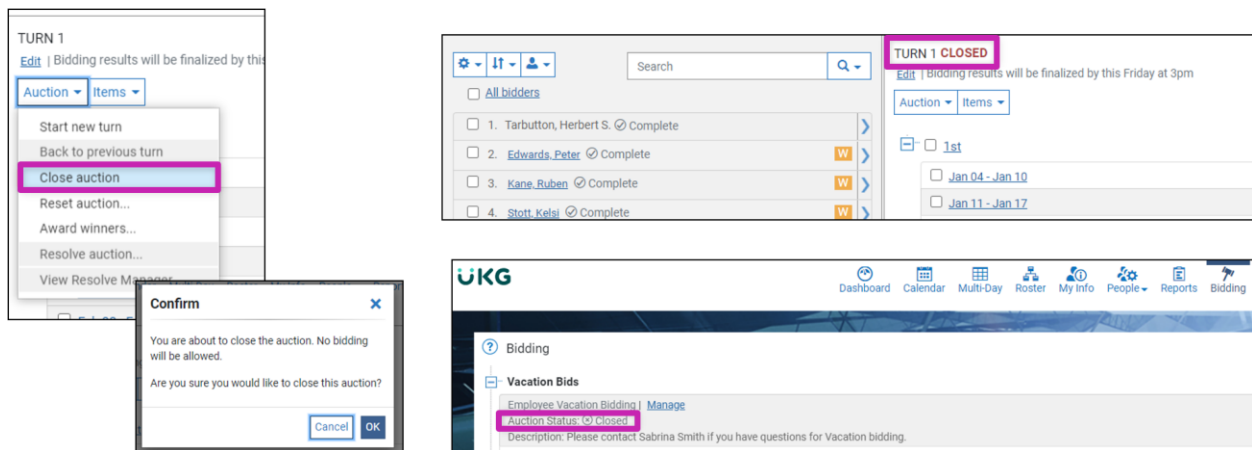
1. Navigate to the **Employee Vacation Bidding** by selecting the **Manage** hyperlink.
2. Select the box for the next employee, Leslie Cook, and bid for an open bid item.
 1. Select Save
3. Leslie no longer wants the dates selected. Confirm the dates for the 2nd round bid choices.
4. Check Leslie's name in the **Bidders List**.
5. Select the **Bidders Actions** dropdown and select **Remove bids**.
6. **NOTE** – Leslie only wants to remove the 2nd round bid. Select the checkmark for the correct item and the X for the bid to retain.

7. Select **OK**.
8. To restore Leslie to Active status so they may bid again, select the box of the employee.
9. Select the **Bidders Actions** dropdown and select **Restore Bidder's Turn**. The bidder is now listed as Active.
10. Finish bidding for the remainder of the bidders to complete Turn 2. Select bid items at random for each remaining bidder.

Complete the Bid

Close the Bid

The bid administrator may **Close** the bid at any time to prevent bidders from adding, removing, or changing their bids. Closing the bid is typically done once all bids have been submitted. The bid may also be closed before the next round is ready to start. Bidding is closed at the conclusion of the **Award** phase to prevent unwanted changes.



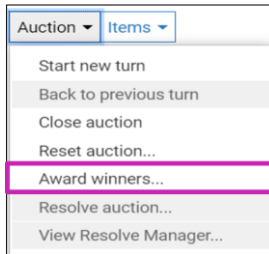
Exercise 7 - Close the Bid

1. Navigate to the **Employee Vacation Bidding** by selecting the **Manage** hyperlink.
2. Select the **Auction** dropdown.
3. Select **Close auction**.
4. A confirm window appears: "You are about to close the Auction. No bidding will be allowed. Are you sure you would like to close this auction?"
5. Select **OK** to close the auction. Selecting **Cancel** closes out the confirm window and returns to the open auction. After a bid is closed, TeleStaff tags the bid as closed in the dashboard.

Award the Bid

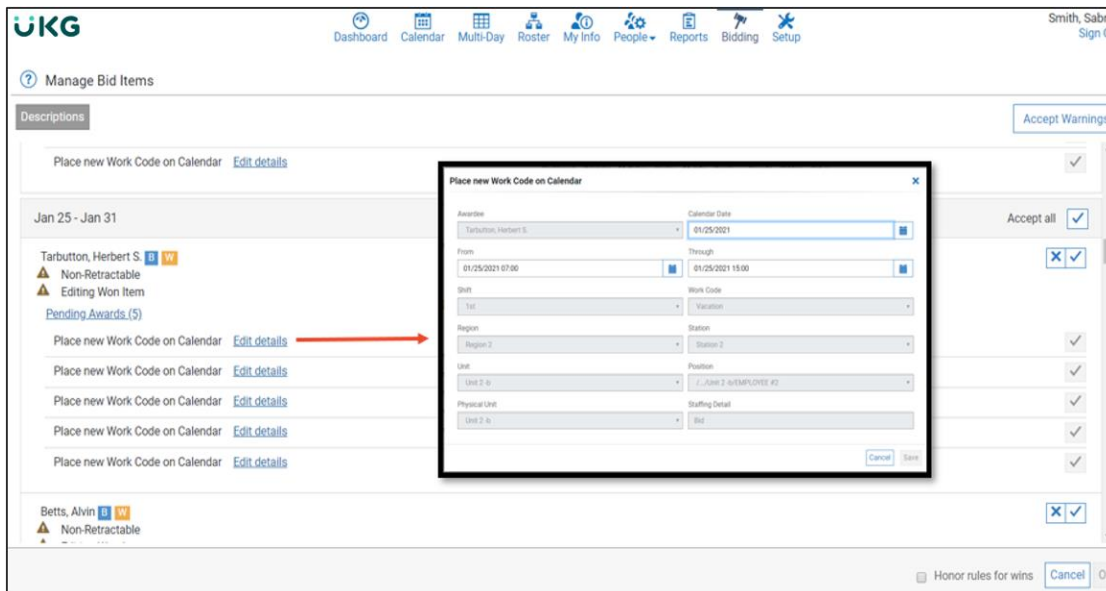
The last step of the bid process is to **Award** bid items to the winners. Any necessary adjustments to the bid are made prior to awarding. After the completion of the award phase, the bid items awarded are visible in the corresponding area. Work codes are visible on the calendar and roster while new assignments are visible in the employee’s assignment tab.

From the Auction dropdown, select Award winners...

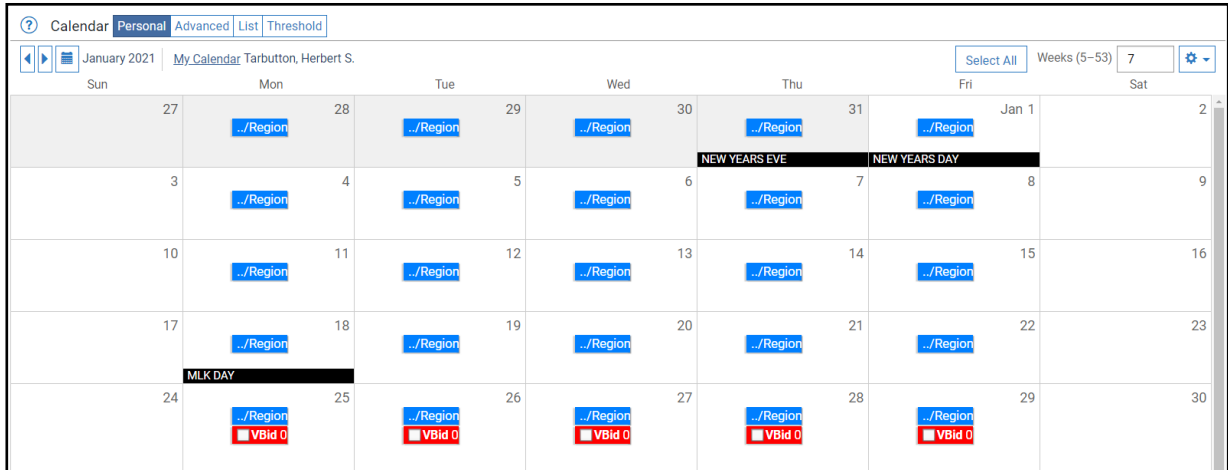


The **Manage Bid Items** window provides bid details including exactly what is being awarded. In this example, it shows Tarbutton is being awarded 5 work codes. Selecting **Edit details** displays comprehensive details of the awarded item.

Select **Accept Warnings** to approve all awards and expedite the approval process. Select **OK** completes the award process.



Note - Tarbutton’s **Calendar** is updated to include the awarded vacation bid work codes.



Exercise 8 - Award the Bid

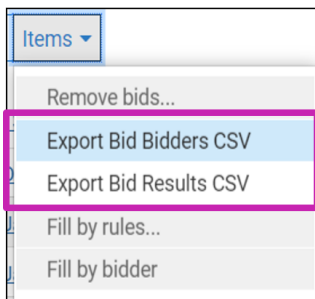
1. Navigate to the **Employee Vacation Bidding** by selecting the **Manage** hyperlink.
2. In the Auction Item pane, select the **Auction** dropdown.
3. Select **Award winners....**
4. The Award Winners confirmation screen shows. Review the bids by person by selecting **Edit Details** links.
5. When ready to continue, select **Accept Warnings**.
6. Select **OK** from Confirm Accept Warnings popup window.
7. Select **OK**.

Archive the Bid

Archiving bids preserves historical bid data. Archiving allows organizations to easily save bidding history. Once saved, the bid items used in the current bid are easily updated to be used for next year's bid by updating the effective date and bid items.

Export Results

There are two types of exports an administrator can run following the end of a completed bid. The results export provides the following:



- Export Bid Bidders CSV
- Export Bid Results CSV



Export Bid Bidders CSV:

This export provides details of the bidders list, including bidder configuration and status details.

	A	B	C	D	E	F	G	H	I	J	K
1	RscMaster	SrcAucite	SrcAucitemNamCh	Status	Ordinal	RscMasterNameCh	BidderMa	BidTime	BidMinut	TurnBidCc	TurnWinC
2	228	372	Jan 25 - Jan 31	DONE	1	Tarbutton, Herbert S.				0	0
3	230	369,372	Jan 04 - Jan 10, Jan 25 - Jan 31	DONE	2	Edwards, Peter				1	1
4	236	374,398	Feb 08 - Feb 14, Jul 26 - Aug 01	DONE	3	Kane, Ruben				1	1
5	238	376,410	Feb 22 - Feb 28, Oct 18 - Oct 24	DONE	4	Stott, Kelsi				1	1
6	240	386,377	May 03 - May 09, Mar 01 - Mar 07	DONE	5	Appleton, Ned				1	1
7	239	414,369	Nov 15 - Nov 21, Jan 04 - Jan 10	DONE	6	Alvarado, Woody				1	1
8	243	420,369	Dec 27 - Jan 02*, Jan 04 - Jan 10	DONE	7	Bone, Julian				1	1
9	249	370,376	Jan 11 - Jan 17, Feb 22 - Feb 28	DONE	8	Tate, Dillan				1	1
10	254	371,386	Jan 18 - Jan 24*, May 03 - May 09	DONE	9	Levine, Omar				1	1
11	261	373,375	Feb 01 - Feb 07, Feb 15 - Feb 21*	DONE	10	Mercer, Ivan				1	1
12	260	396,372	Jul 12 - Jul 18, Jan 25 - Jan 31	DONE	11	Betts, Alvin				1	1

Column	Description
A/B	Reference tables in TeleStaff.
C	The bid item selected.
D	Specifies the bidder’s bidding status.
E	The bidder’s order in the list.
F	The bidder’s name.



Export Bid Results CSV

This bid export provides details of the bid including the bidder, item they bid on, and the dates and times of the bid status changes (bid, win and award).

A	B	C	D	E	F	G	H	I	J	K	
RscMaster	SrcAucter	Person	Item	Bid	B	W	A	Qty	Source	Turn	Payroll ID
239	369	Alvarado, Woody	Jan 04 - Jan 10	1	4/20/2020 14:53	4/20/2020 14:53	4/21/2020 9:43			2	15
243	369	Bone, Julian	Jan 04 - Jan 10	1	4/20/2020 14:53	4/20/2020 14:53	4/21/2020 9:43			2	19
230	369	Edwards, Peter	Jan 04 - Jan 10	1	4/20/2020 12:19	4/20/2020 12:19	4/21/2020 9:43			1	5
249	370	Tate, Dillan	Jan 11 - Jan 17	1	4/20/2020 12:21	4/20/2020 12:21	4/21/2020 9:43			1	27
254	371	Levine, Omar	Jan 18 - Jan 24*	1	4/20/2020 12:21	4/20/2020 12:21	4/21/2020 9:43			1	29
260	372	Betts, Alvin	Jan 25 - Jan 31	1	4/20/2020 14:54	4/20/2020 14:54	4/21/2020 9:43			2	36
230	372	Edwards, Peter	Jan 25 - Jan 31	1	4/20/2020 14:52	4/20/2020 14:52	4/21/2020 9:43			2	5
228	372	Tarbutton, Herbei	Jan 25 - Jan 31	1	4/20/2020 12:19	4/20/2020 12:19	4/21/2020 9:43			1	3
261	373	Mercer, Ivan	Feb 01 - Feb 07	1	4/20/2020 12:21	4/20/2020 12:21	4/21/2020 9:43			1	35
236	374	Kane, Ruben	Feb 08 - Feb 14	1	4/20/2020 12:20	4/20/2020 12:20	4/21/2020 9:43			1	11
261	375	Mercer, Ivan	Feb 15 - Feb 21*	1	4/20/2020 14:54	4/20/2020 14:54	4/21/2020 9:43			2	35
238	376	Stott, Kelsi	Feb 22 - Feb 28	1	4/20/2020 12:20	4/20/2020 12:20	4/21/2020 9:43			1	13
248	376	Tate, Dillan	Feb 22 - Feb 28	1	4/20/2020 14:54	4/20/2020 14:54	4/21/2020 9:43			2	27

Column	Description
A /B	Reference tables in TeleStaff.
C	The bidder’s name.
D	Specifies the item that the bidder won.
F	List the date timestamp of when the “bid” was made.
G	List the date timestamp of when the “won” phase was executed.
H	List the date timestamp of when the “award” phase was executed.
H	Explains where the quantity was debited from; this refers to a field in the setup folder of the targeted bid.
J	Lists the turn the item was won.

Exercise 9 - Export the Bid

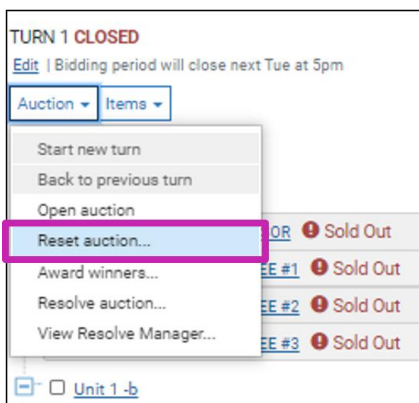
1. After bidding has concluded, select the **Items** dropdown in the bid window.
2. Select **Export Bid Bidders CSV**.
3. **Save** file.
4. Navigate back to the Bid Items dropdown.
5. Select **Export Bid Results CSV**.
6. **Save** file.

Preference Bid and Advanced Bid Topics

The following section reviews position bidding utilizing **Preference** method. For the purposes of this training, let us suppose it is mid-year and there have been some changes in the organization. Some people have left the organization and now the bid needs to be prepared for the open positions. This section builds on concepts learned earlier as many bid concepts relate to preparing both a queue and a preference bid.

In a preference bid, the bidder selects their bid choices by sequencing their preferred items numerically. Unlike a queue bid, bidders do not have to wait until more senior bidders make their selections. The bidder ranks selections by preference; indicating the most desired item with “1”, their second choice with “2”, their third choice with “3” and so on. After all bidders have made their selections (bid phase) TeleStaff resolves the bid using rules to determine which employee wins the item according to the configured criteria (win phase). Last, after the bid administrator reviews the results, the bid items are added (new assignments created) during the award phase.

Reset the Bid

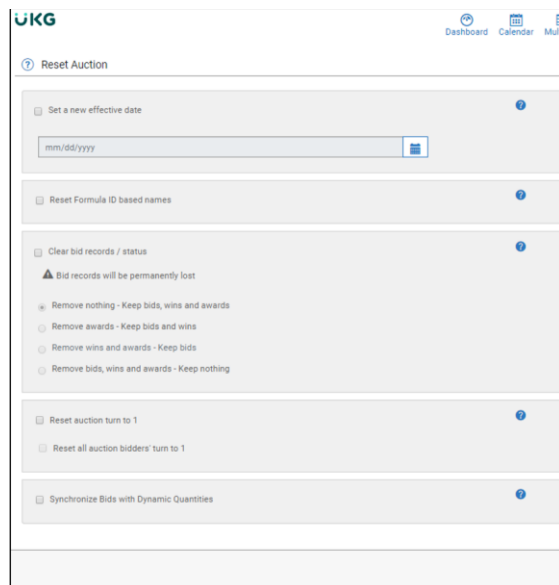


Select **Reset Auction...** in the **Auction** menu to repurpose a bid for future use by redefining the dates people bid in the manage bidding area. In the bidding area, the previous bids are in closed status. Ensure the results are archived and confirm the bidders list to prepare the new bid.

Select the Auction dropdown and select Reset Auction. The window opens (pictured below).

- **Set a new effective date:** Checking the box enables the calendar date box. The effective date is the target date for the auction’s win order, bid item qualifications, bid item award properties, and dynamic conditions. The effective date is usually set to the date that won bid items are awarded to winners and is used to define the first date of the bid items.
 - For example, if the vacation period is from Jan 1, 2021 through Dec 31, 2021, then the effective date is set to Jan 1, 2021. Resetting the date affects all the dynamic properties in the bid. This allows organizations to automatically update bid items and dates without going into setup or to create a brand-new bid.
- **Reset Formula ID based names:** Updates the names and descriptions of bid names that reference formula ID names. Names may change if they are dynamically date based. This is typically selected for resetting a vacation bid for the next bid cycle. For instance, the effective date is changed, the formula ID names must be reset so the bid items display the new dates to match the new effective date.
- **Clear bid records/status:** Removes previous bid status based on the secondary choice.
 - **Remove nothing – keep bids, wins or awards:** Select this choice to keep bid results but update details.

- **Remove awards – Keep bids and wins:** Select this choice to keep bid records but remove the award status from each record. This choice does not remove awarded items, just the award status in the bid.
- **Remove wins and awards – Keep bids:** This removes the win and award checkmarks from all items. Removing the award record does not "undo" award actions.
- **Remove bids, wins and awards – keep nothing:** Removes all bid records for the bid. There is no remaining record of any bids, wins, or awards made for any of the auction items. This is typically the choice selected for resetting a bid for the next bid cycle.
- **Reset Bid to turn 1:** When multiple turns are configured, this choice resets the bid back to turn one.
 - **Reset all bid bidders to turn 1:** This starts the bidders back to their initial turn.
- **Synchronize Bids with Dynamic Quantities:** Only selectable when clear bid records are un-selected. This setting synchronizes applicable bids with the configuration of their corresponding dynamic quantities.



Important: The bid must be reset from the setup bidding area when the following changes occur:

- **Bidding quantity changes:** For example, the current bid allows three people across ranks to bid for time-off. However, next year's bid allows five people off and only one of each rank can bid for time-off.
- **The visibility of certain dates changes:** For example, the next bid does not allow bidding for highly coveted dates, like January 1st. Instead, these dates are handled differently, either in a different round or through an entirely different bid.
- **The visibility of certain position changes:** For example, different positions become available.

Exercise 10 - Reset Auction and Clear Previous Bid

Each bid is reusable after resetting the bid and clearing the previous bids results.

1. To clear out earlier bidding, navigate to the **Position** bid. selecting the **Manage** hyperlink
2. Select **Auction**.
3. Select **Reset Auction**.
4. The Reset Bid window appears.
5. Check **Set a new effective date**.
6. Enter the **date** the new bid items start.
7. Check **Reset Formula ID** based names.
8. Check the **Clear bid records/status box** and select **Remove Bids, Wins and Awards status...Keep nothing**
9. Select **Save**.

Update and Validate Bid Items

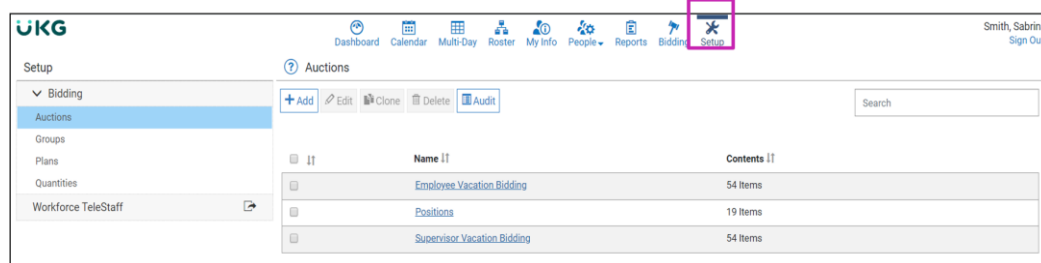
Review the bid and verify all bid items are correct. There may be instances in a position bid where positions are not available for bid. Additionally, in a vacation bid, the number of weeks in a bid cycle may fluctuate. To ensure there are not too many or too few weeks visible and biddable, review the Bid Items pane and make any potential adjustments. Best practice is to confirm the bid by reviewing the bid and make changes in setup, as necessary.

Hide Auction Items

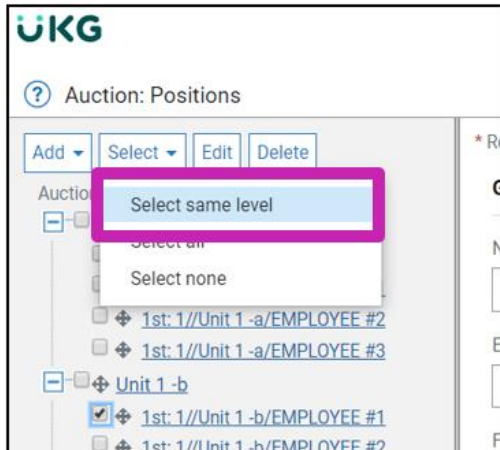
There may be occasions where items need to be removed from the bid, either temporarily or permanently. This is common in a position bid but is still possible for dates in a vacation bid.

In this example, there is shift due to people leaving the organization, so a bid is opened for only the four vacant positions. Once the bid is created within setup, bid items are optionally set as **Visible** or **Biddable**.

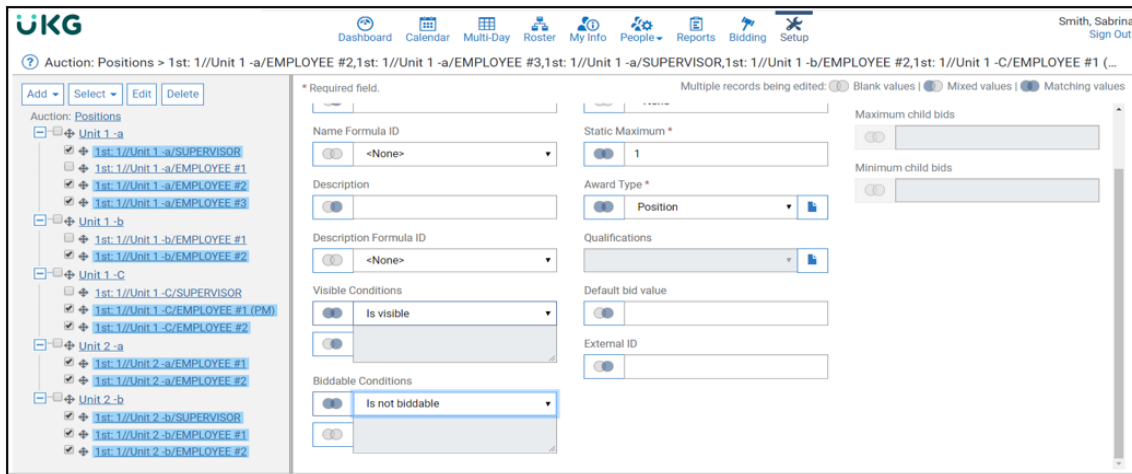
Locate the bid setup by navigating to **Bidding** and selecting **Setup** in the navigator to access the bid setup area.



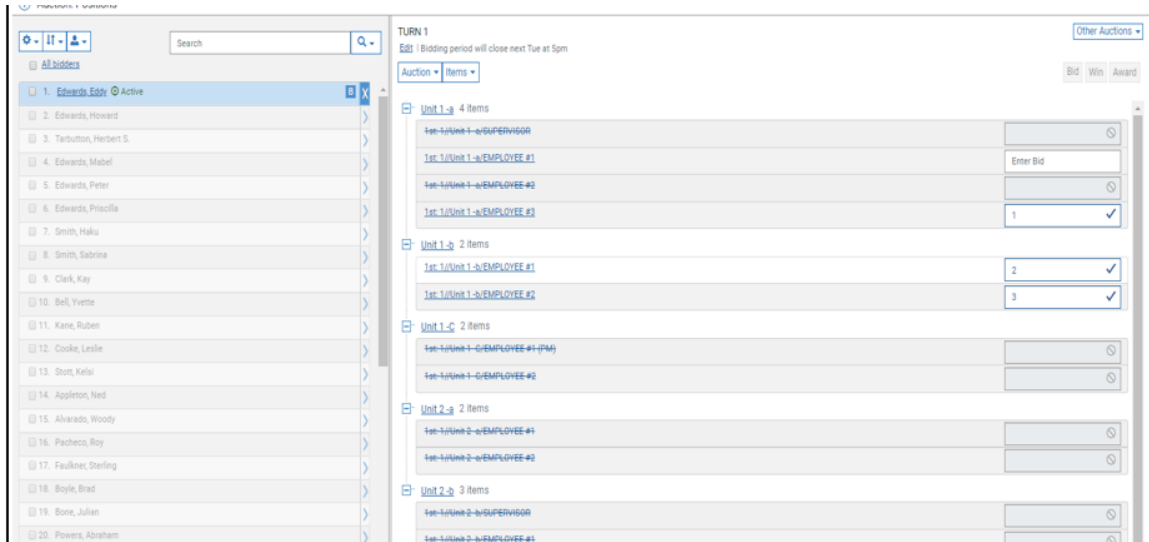
Bid positions are listed in the pane. Identify and select the positions for updating. In this case, select all positions and remove only the remaining positions (positions open for bidding). Select **Edit** to modify all selected positions. **Select all** or select multiple auction items and select **Edit** to enable the multi-edit mode.



Select on any one of the selected auction items to open the **Auction Properties** screen. In the **Visible Condition** drop-down box, select **Is Not Visible**. Optionally, keep the item visible but set **Bidding Conditions** to **Is not biddable** so employees see all positions but can only bid on those set to bid.

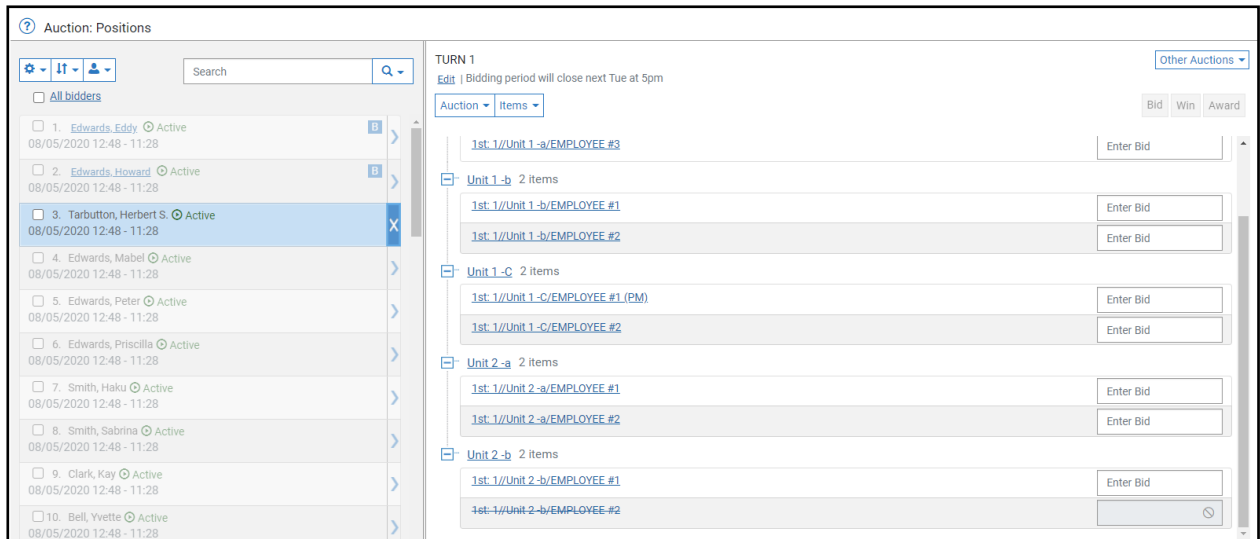


The auction items are no longer displayed in the bidding window.



Exercise 11 – Remove a Position from the Bid

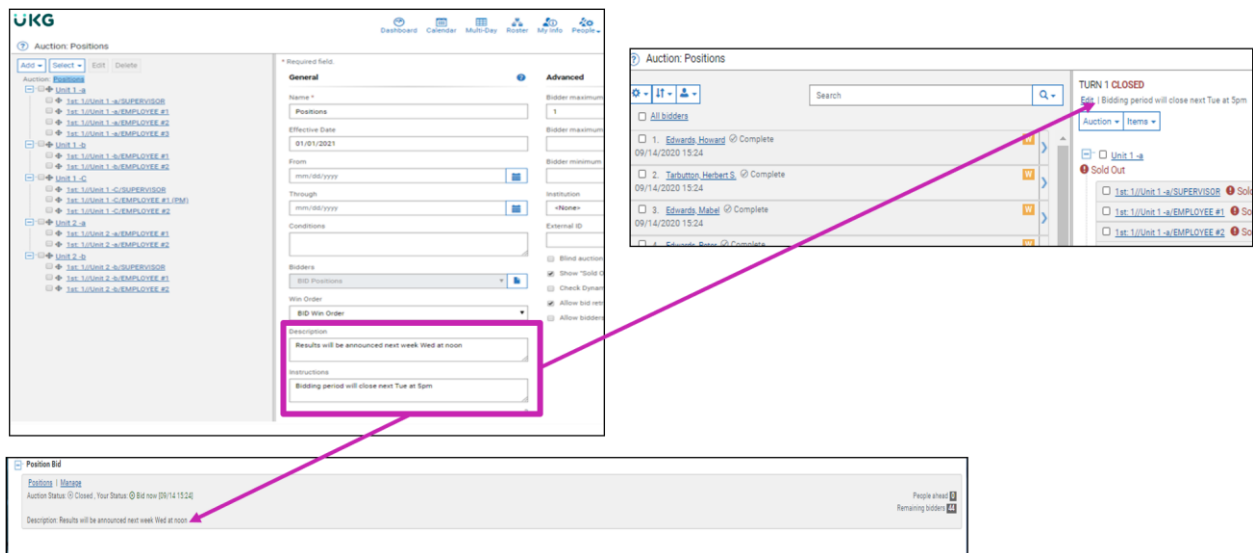
1. From the bid select **Setup** in the Navigator.
2. Under **Auctions**, Select **Positions**.
3. Select the checkmark for position Unit 2 –b – Employee #2
4. Select **Edit**.
5. In the **Biddable Conditions** dropdown select **Is Not Biddable**
6. Select **Save**.
7. Navigate back to the Bid, select an employee, and note the position is not available for bidding (but is visible).



Update the Description and Instruction Fields

The **Description** and **Instruction** fields are used to display information to the bidders in the bidding Dashboard within each bid. This update requires setup authority.

1. To make any necessary updates to these messages, enter the message in **Description** or the **Instruction** field.
2. Select **Save**.



Exercise 12 - Update Setup Items

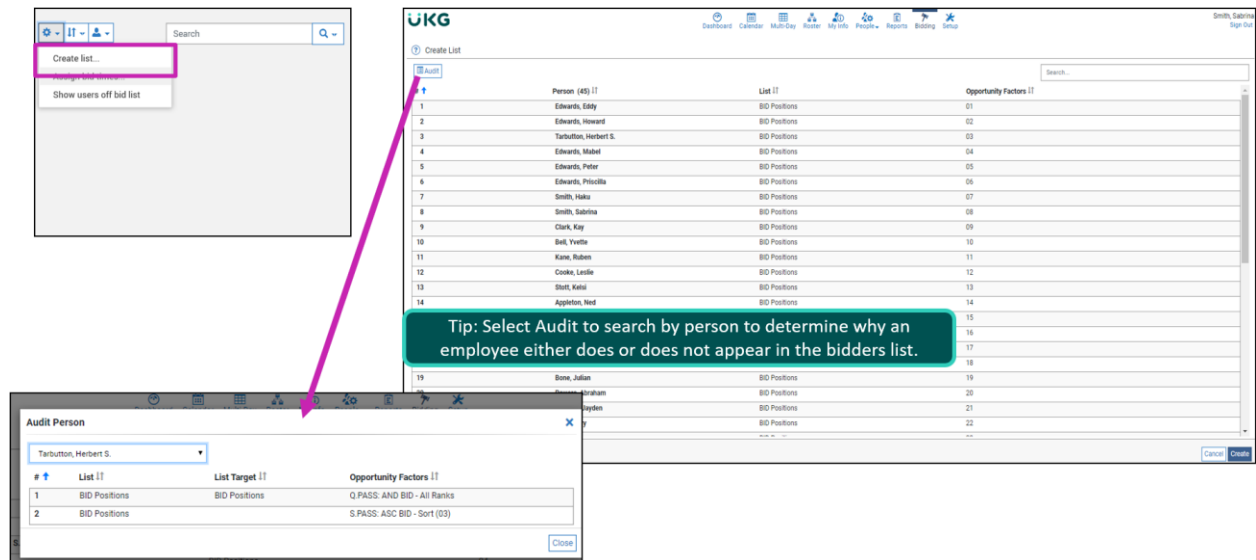
1. From the bid window, select **Setup** in the Navigator.
2. Select the **Positions bid**.
3. Select the **Auction: Positions** hyperlink (just above the bid items).
4. Enter new text “New position openings” in the Description.
5. Enter Instructions for within the bid – “Bid for open spots.”
6. Select **Bidding**.
7. Confirm the **Description** has been updated for Position bid.

Create/Redraw Bidders List

The bidders list holds the names of all employees qualified to participate in the bid. The names are typically sorted in seniority order. When a new bid is first opened, the bidder's pane is empty. To create the list, select the gear icon and select **Create Bidders List**.

The list must be recreated each year to include new hires, employees who have left or switched roles, and so on. The data needs to match the target bid. Review and confirm the bidder's list to ensure the correct people appear in the proper seniority order.

Select the **gear** icon, and select **Create list...** The **Create List** window opens. Review the details of the list before selecting **Create**.



Within the gear menu, there is a selection called **Show users off bid** list. This choice displays a list of bidders not on the list and is used for verification and trouble shooting. This feature also allows the bid administrator to bid an employee who is not in the bidder's list but may need to bid anyway.

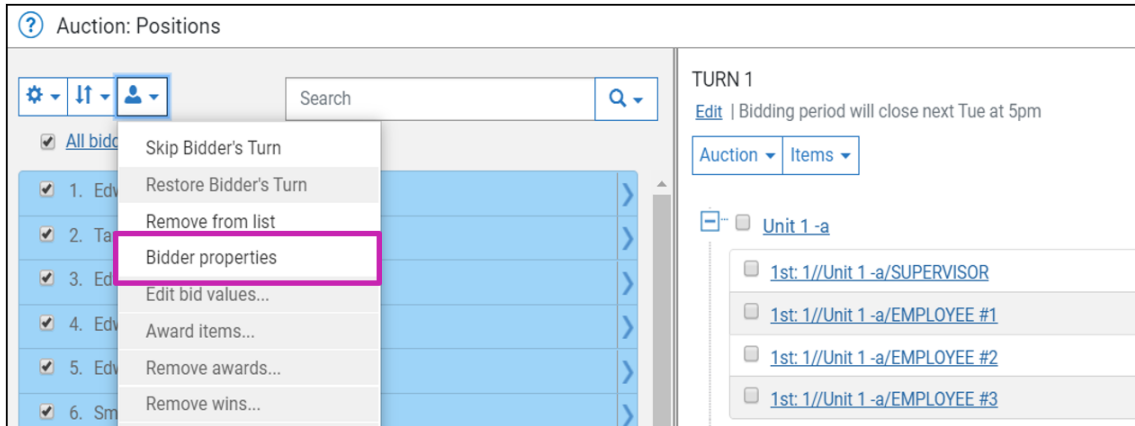
Exercise 13 - Redraw Bidders List

To redraw the list:

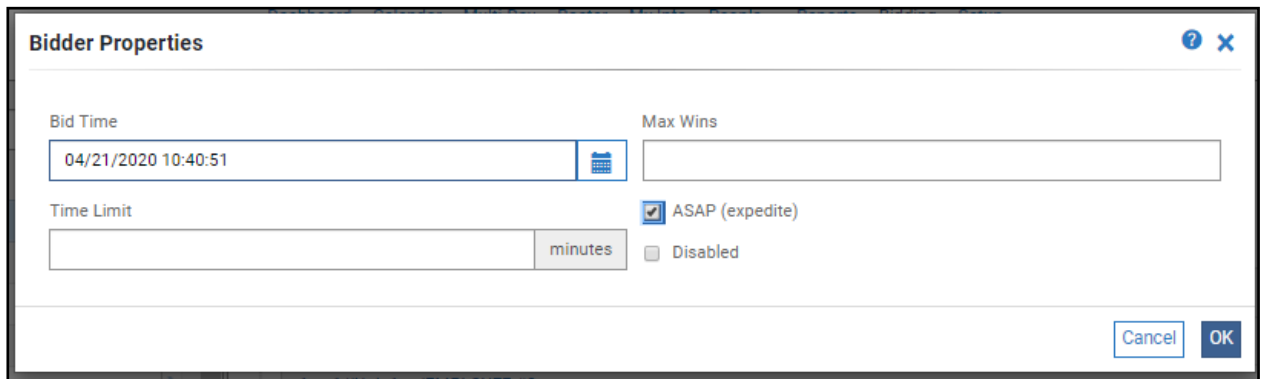
1. Navigate to the **Positions** bid by selecting the **Manage** hyperlink.
2. Select the **gear** icon.
3. Select **Recreate Bidder's list...**
4. Review list for accuracy (list is sorted by lowest opportunity number to highest).
5. Select **Recreate**.

Bidder's Properties

Bidders must be **Active** to make their bid selections. For a preference bid, bidders are activated by setting a **Bid time** from the **Bidder Properties** window. Navigate to Bidder Properties by selecting the **Bidders Actions** dropdown and selecting **Bidder Properties**.



In **Bid Time**, enter the date and time bidding opens. Optionally enter a time limit to automatically end the bidder's active status. The **Time Limit** uses the Bid Time to calculate the duration. For instance, if the Bid Time is November 1, 2021 12:00:00 and the Time Limit is set to 1440 minutes (24 hours), then the bidder has until November 2, 2021 12:00:00 to complete their bids.



Exercise 14 - Bidder Properties

To activate all bidders in the bidder pane for bidding:

1. Navigate to the **Positions** bid by selecting the **Manage** hyperlink.
2. In the Bidders List pane, select the checkmark for **All Bidders**.
3. Select the **Bidders Actions** dropdown, then select **Bidder Properties**.
4. In **Bid Time**, select the calendar. The Bid Time populates with the current date and time.
5. Select **OK**.
6. All bidders are **Active**.

Manage an Active Bid

Introduction

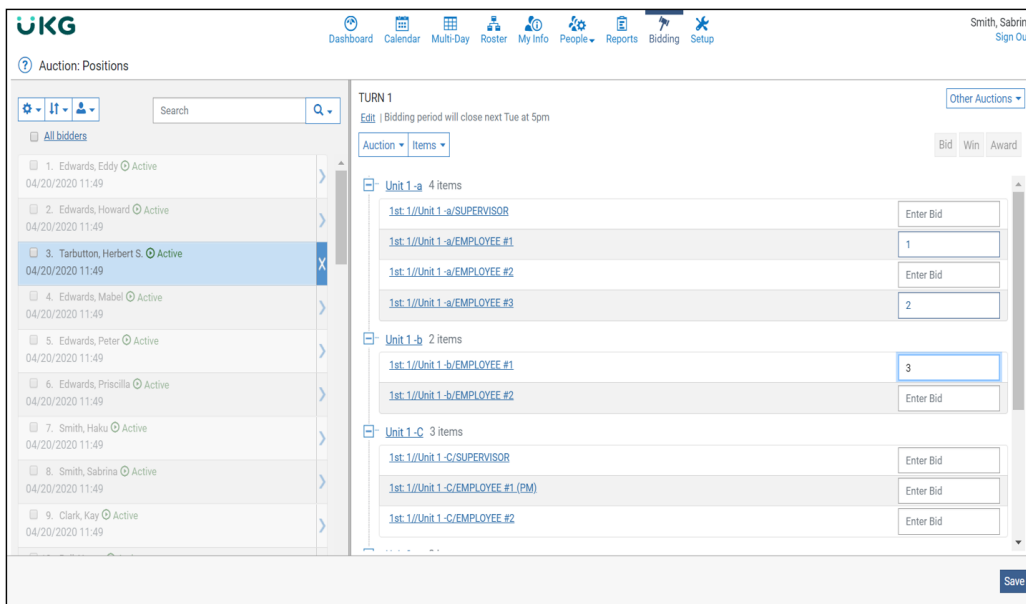
The demonstrations in this section continue the previous example of a preference position bid. Most examples are relevant for a queue style bid; any preference-specific examples are referenced as such throughout.

Preference Bid

Sabrina Smith views an existing bid and bids for the employees. Navigate to the Positions bid and select the arrow next to the employee’s name. Selecting the arrow allows the administrator to preview the bid in the employee view.

In this example, all employees can participate in the bid simultaneously. The administrator selects a preference selection by entering the preferred position using numbers in the bid field. Bids must be entered in order of preference. Enter 1,2,3, and so on. TeleStaff automatically sequences the bid numbers to ensure each bid has a unique numeric value.

For instance, if the bidder bids on the first bid item with a numeric value of 3, it is automatically updated to 1. If after entering 1, 2 and 3 across three items, enter a “1” on the fourth item, the fourth item becomes the new 1 while the previous three items change to the next subsequent number (1 becomes 2, 2 become 3, 3 become 4).



As with the queue, there are three stages of the bid process: bid, win and award. The 3 phases of bidding are indicated by a B (for bid), W (for win) and A (for award) on the bidder’s list.

Bid Phase: The bid phase is the active stage of bidding when employees are placing their bid selections.

Win/Resolve Phase: Also referred to as the resolving phase in a preference bid, occurs after the bid phase and confirms who wins the item.

Award Phase: The final stage is the award phase. Bid items are secured and granted to the winners in this phase. Bid items are created in the winner’s assignment tab, calendar, or roster in the position, work code, or roster bid, respectively.

If **Allow Bid Retraction** is not checked, the bidder can add new bids, but they cannot edit the numeric value or remove previously saved bids. If Allow Bid Retraction is checked, the employee can make any changes until the bid time expires or the bid is closed.

Exercise 15 - Preference Bidding

1. Navigate to the **Positions** bid by selecting the **Manage** hyperlink.
2. Select the **arrow** next to the first person in the bidders list, Howard Edwards.
3. Enter values of 1, 2 & 3 on the preferred **EMPLOYEE** bid selections.

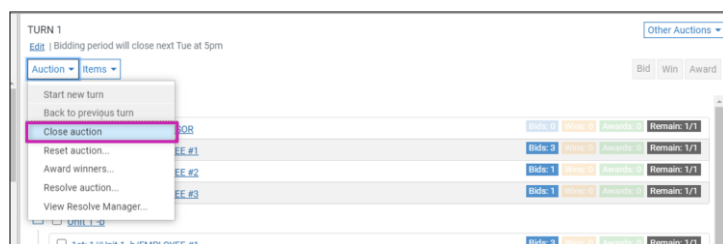
Unit 1 -a 4 items	
1st: 1//Unit 1 -a/SUPERVISOR	Enter Bid
1st: 1//Unit 1 -a/EMPLOYEE #1	1
1st: 1//Unit 1 -a/EMPLOYEE #2	2
1st: 1//Unit 1 -a/EMPLOYEE #3	3

4. Select **Save**.
5. Select the arrow for another bidder, Herbert Tarbutton, and bid for the same selections as the first person.
6. Complete bidding for 10 bidders.
7. Note there is no bidding order and bidders can bid in any order.

Close the Bid

If a time limit is not set for the preference style bid, bidders may continue to modify their selections.

Close Auction prevents further action by bidders. Navigate to **Auction** and select **Close Auction** to close the bid.



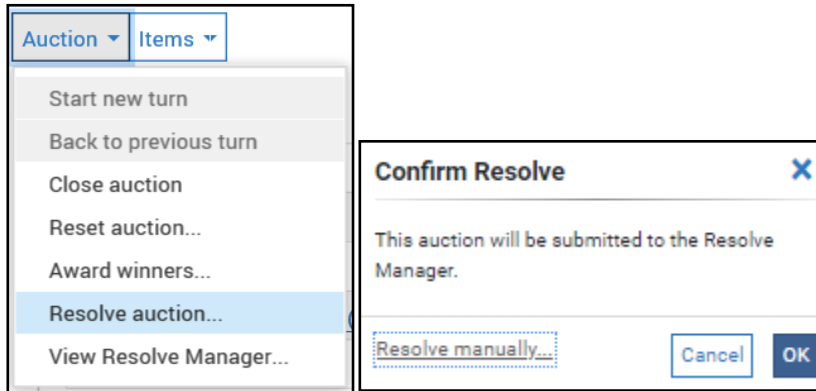
Exercise 16 - Close the Bid

1. Navigate to the **Positions** bid by selecting the **Manage** hyperlink.
2. Select the **Auction** dropdown.
3. Select **Close Auction**.
4. The Confirm window opens. Select **OK**.

Resolve the Bid

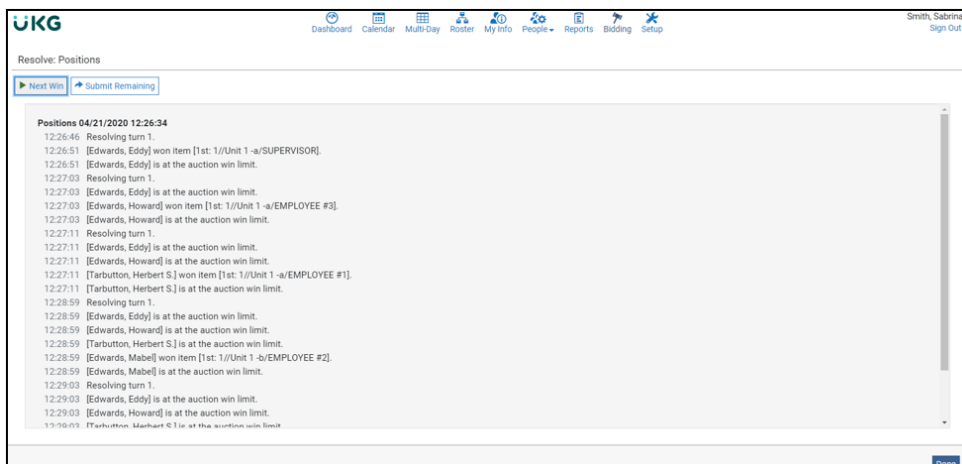
A preference bid must be resolved to assign win status to bidders. The resolve process considers everyone's bid selections and uses rules to determine the winner. TeleStaff uses defined rules and bid configuration properties to choose winners for all bid items.

After selecting **Resolve Auction**, the **Confirm Resolve** window appears.

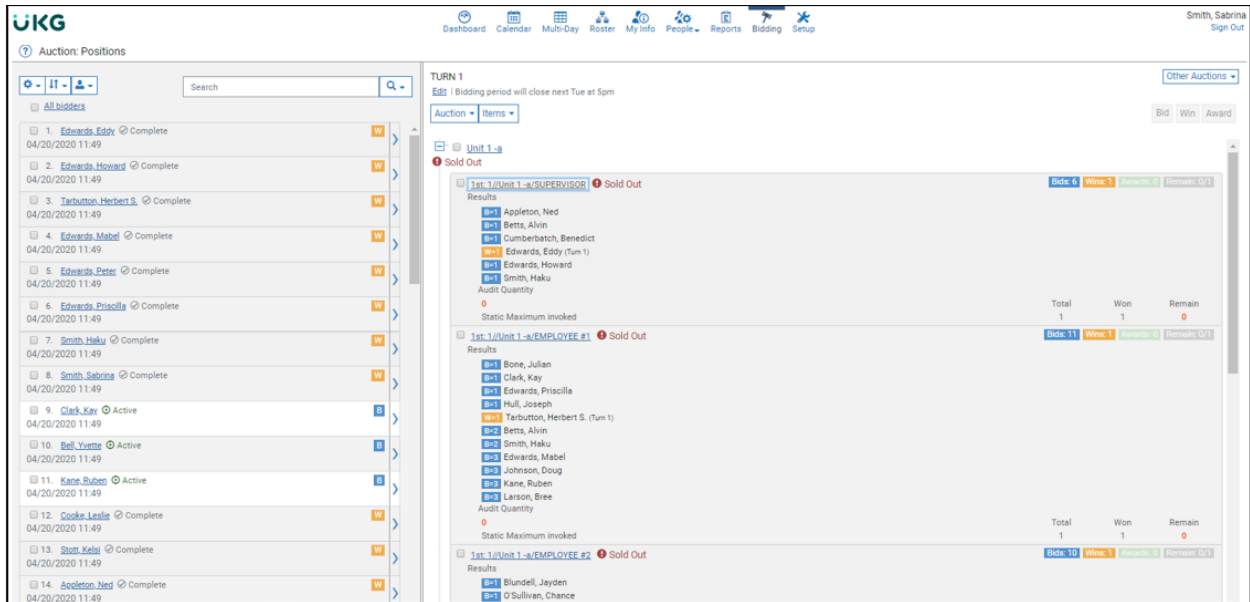


There are 2 ways to resolve the bid. **Resolve manually** or automatically behind the scenes. Selecting **OK** causes TeleStaff to automatically resolve the preference bid.

Selecting **Resolve manually...** displays winners as TeleStaff is processing the bids.



In the following example, selecting the bid item displays the winner (W) and the preference values (B=1, B=2, B=3, W=1, and so on.) for each employee who placed a bid.



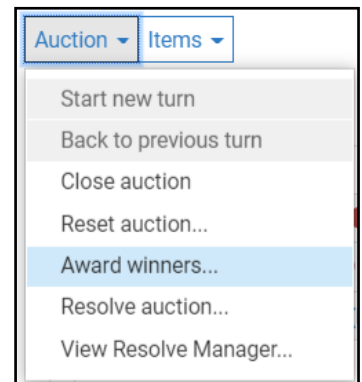
Exercise 17 - Resolve

1. Navigate to the **Positions** bid by selecting the **Manage** hyperlink.
2. Select the **Auction** dropdown.
3. Select **Resolve auction...**
4. Select the **Resolve manually...** hyperlink
5. Select **Next Win**.
6. Select **Submit Remaining**. Wait about 30-60 seconds to allow TeleStaff to complete the resolve phase.
7. Select **DONE**.
8. The bid displays who has won an item in the bid – but it has not yet been awarded.

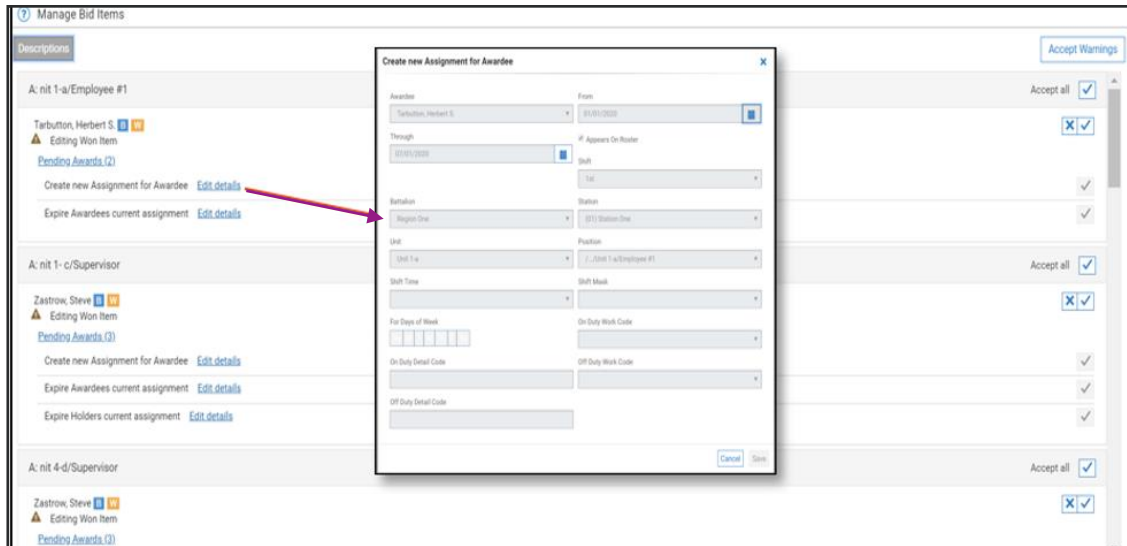
Awarding the Bids

Although bidders have won a new position from the bid, the new assignment itself (found in the person’s assignment tab) is not created until the administrator completes the award.

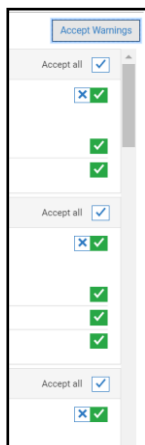
Select the **Auction** dropdown and select **Award winners...**



The **Manage Bid** items window opens with bidding details by bid item. In this example, the position is listed with the winner. Select **Edit details** to see the bid item details. This outlines the details of what is being awarded.



Check **Accept all** to approve by bid item. Select **Accept Warnings** to auto populate the approve checkmark for all bid items in this window. Select **Save**.

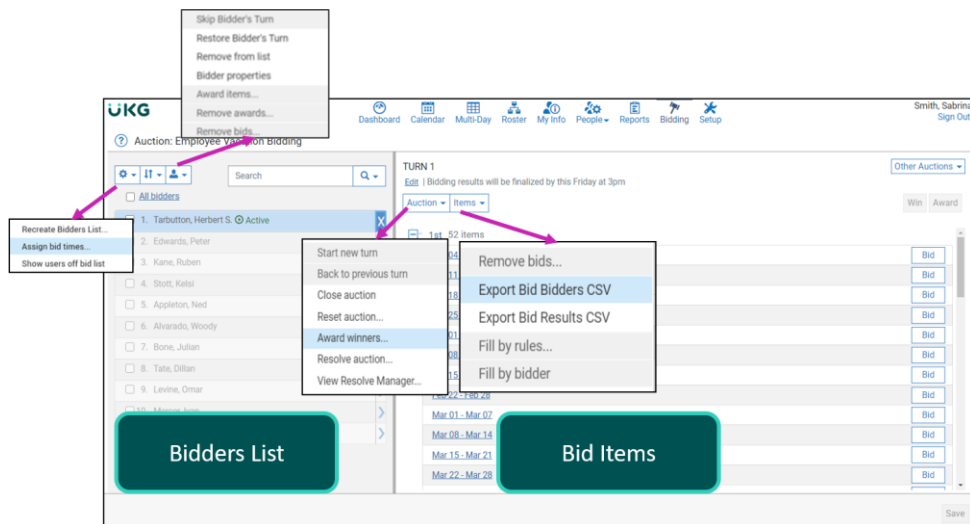


Tarbutton's **Assignments** tab is updated to reflect the change. The award process automatically creates the new position that starts on the effective date while simultaneously ending the bidder's current assignment one day prior to the effective date.

Exercise 18 - Award

1. Select the **Auction** dropdown.
2. Select **Award winners...**
3. The **Manage Bid Items** window opens.
4. Select the **edit details** link to view the details of an awarded item.
5. Select **Accept all**.
6. Notice selecting **Accept all**, only approves one bid item.
7. Select **Accept Warnings** to approve all.
8. The **Confirm Accept Warnings** window opens with the message, “Are you sure you would like to accept all auction item warnings?”
9. Select **OK**.

Glossary



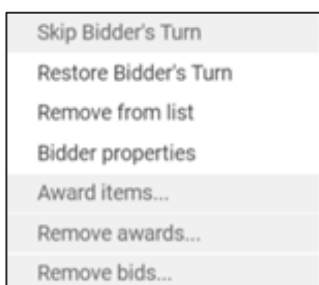
Manage Bid Dropdown Reference

Gear Dropdown



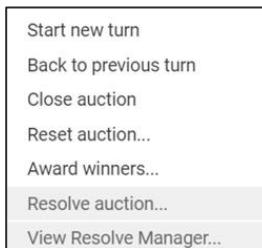
- **Create/Recreate bidders list:** creates bidders list. Necessary after resetting bid. Preview list for accuracy.
- **Assign bid times:** Provides each bidder in the list with a specified time for bidding.
- **Show users off bid list:** Provides a list of bidders not included in the bidders list. This feature allows a bid administrator to troubleshoot and find a person who is not on the current bid's list of bidders.

Silhouette Icon Dropdown



- **Skip Bidder's Turn:** Allows the administrator to automatically skip a turn for a bidder.
- **Restore Bidder's Turn:** Reinstates the bidders turn.
- **Remove from list:** Allows the administrator to remove a bidder from the seniority list.
- **Bidder properties:** Select a bidder from the list and preview the details of the bidder including bid times and details and max wins, if defined.
- **Award items...:** Allows the administrator to award bids - the last step to complete the bidding process. Awarding of bid items results in the creation of new assignment, adding vacation/PTO work codes, or filling the overtime/extra duty vacancies on the daily rosters. Prior to being able to award items, the bidder must have bid & won at least one item otherwise this choice displays grayed out.
- **Remove awards...:** Removes awarded items from the bidder from the bid. Administrators must remove awarded items from within TeleStaff, such as vacation work codes still on the calendar even after this choice is selected.
- **Remove bids...:** Removes selected bids from the auction. This is only to be used if mistakes have been made by the bidder.

Bid Dropdown



- **Start new turn:** Bid administrators select this feature to start a new turn in a queue method bid (preference method bids automatically start the next turn). Starting a new turn ends the current turn and begins the next turn. The bid resumes at the top of the bidder's seniority list, allowing each bidder to make more bid selections (if available).

- **Back to previous turn:** The bid returns to the previous turn in a bid with multiple rounds. For example, if the bid inadvertently started a new turn while the bid was still in progress, the **Back to previous turn** function returns to the last active bidder.

- **Close bid:** Closes bid and prevents further bidding.
- **Reset bid...:** Allows bid administrators to reuse an existing (completed) bid by simply removing bid data and redefining biddable dates.
- **Award winners...:** After the completion of the award phase, the bid items awarded are visible in the corresponding area. For example, time-off work codes are visible on the calendar and new assignments are visible in the person's assignment tab.
- **Resolve bid...:** In a Preference Bid, rules are used to determine who wins each item. The processing of the rules resolves the bid.
- **View Resolve Manager...** - This window displays the presented bid wins according to TeleStaff's rules processing. Bid administrators can modify bid placements before submitting the bids for award.