UKG

UKG TeleStaff Manage and Administer Bidding Instructor Led Training



Course Topics

Welcome to the UKG TeleStaffTM Bid Administrator Training.

This session covers the following topics:

1. Understand Bidding

- Bidding Dashboard
- Queue Bids
- Preference Bids
- Bid items

2. Navigate the Bidding Tool

- Bidding Dashboard features
- Bidding window
- Bidding for self and others

3. Manage Bids

- Close the bid
 - Export bid results

4. Prepare new bid



The People of Telestaff

- **Herbert Tarbutton** is an end user who uses TeleStaff to view their personal schedule, as well as view the schedule of their colleagues, initiate trades, request time off, and so on. Herbert bids to select a work location and shift as well as annual vacation time.
- Haku Smith uses TeleStaff to manage scheduling-related tasks for employees. Haku
 approves time off, fills daily vacancies, and manages extra duty opportunities. Haku
 also uses the bid to bid for a work location and annual vacation time, as well as help
 manage the bid for his employees.
- Sabrina Smith is the TeleStaff expert for the organization. Sabrina is responsible for reviewing all new features and determining which should be implemented. Sabrina also maintains and manages the bid.



What is Bidding?



Bid Feature

- Centralized tool to manage bid processes.
- Employees 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.



Benefits

- 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 is Bidding?

What scheduling items may be optioned for a bid?

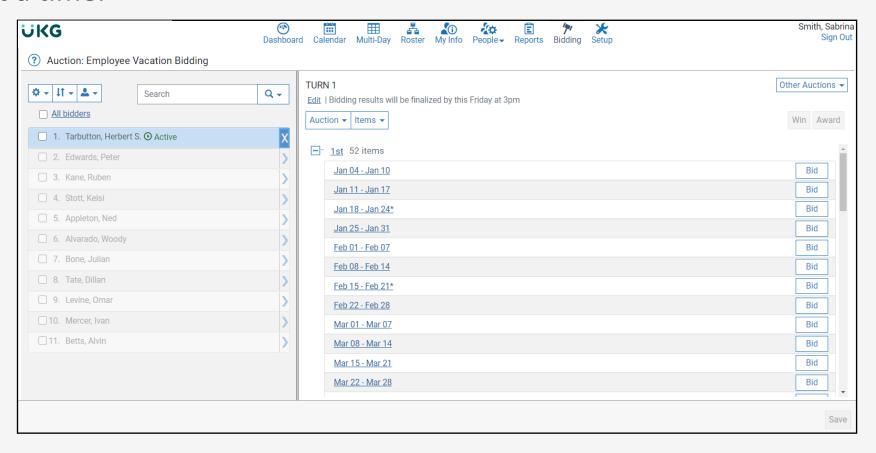
- 1. Vacation/PTO
- Creates leave work code on the calendar on awarded dates
 - Single dates
 - Range of dates
- 2. Position
- Creates a new assignment
 - Area
 - Shift
 - Shift with shift mask
- 3. Work opportunities
- Roster bid for overtime/extra duty opportunities



Bid Strategy – Queue

Consists of a list of sorted bidders, often defined by hierarchy

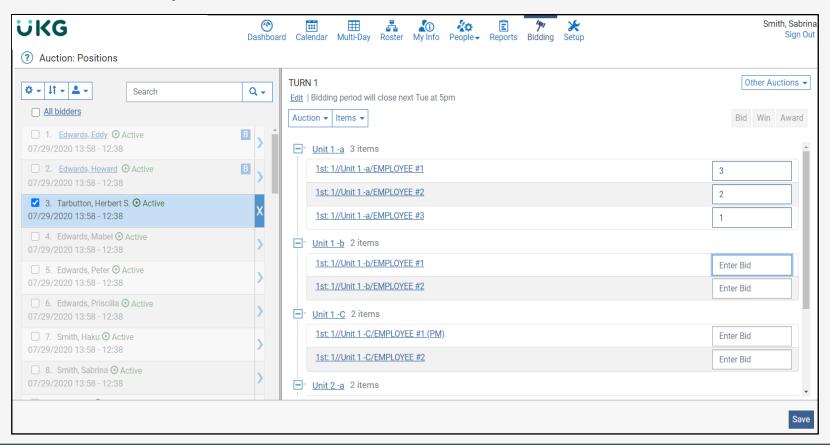
Bid one at a time.



Bid Strategy - Preference

Bidders designate their bid items choices by indicating a first choice, second choice, third choice, concurrently.

Bidders bid simultaneously.



Permissions

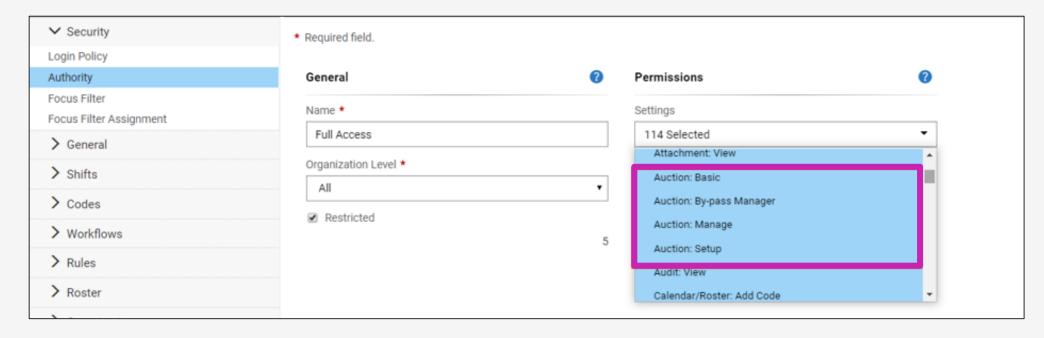
Permissions determine user access.

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

Auctions: Manage

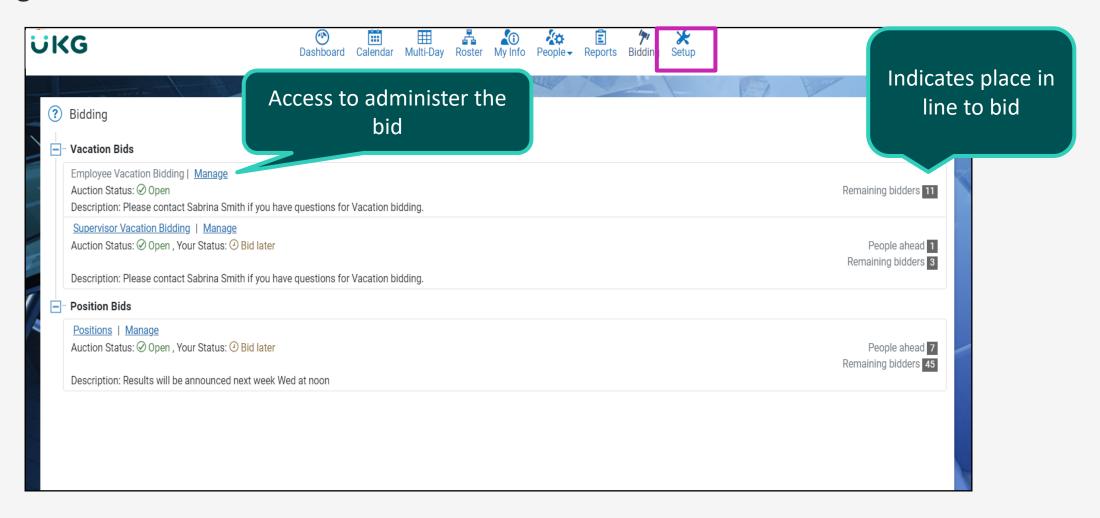
Auctions: Setup

Auction: By-pass Manager



Dashboard Overview

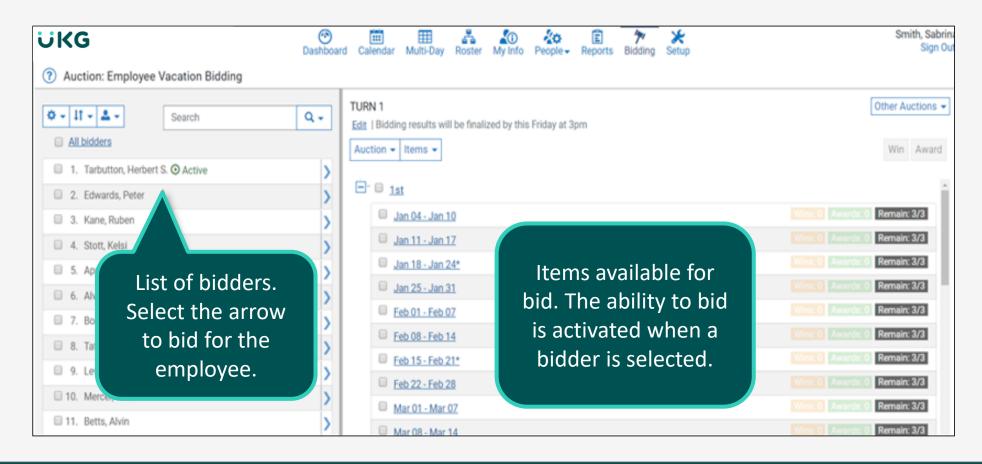
Bidding dashboard lists each bid and its details.



Bid Window Overview

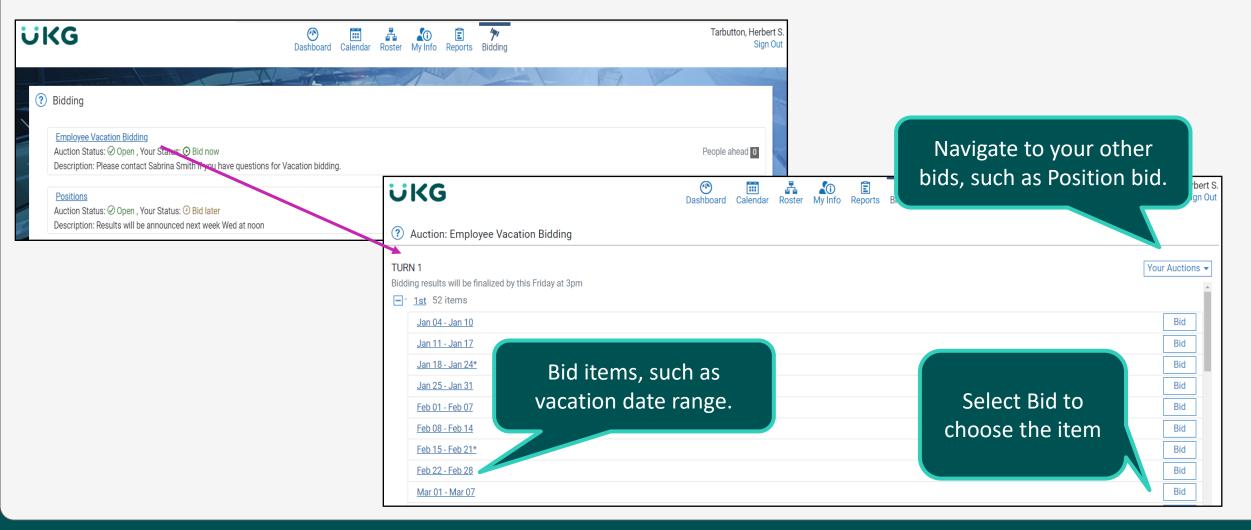
Manage bid view

Bidders list is created



Employee View

Simplified access and view

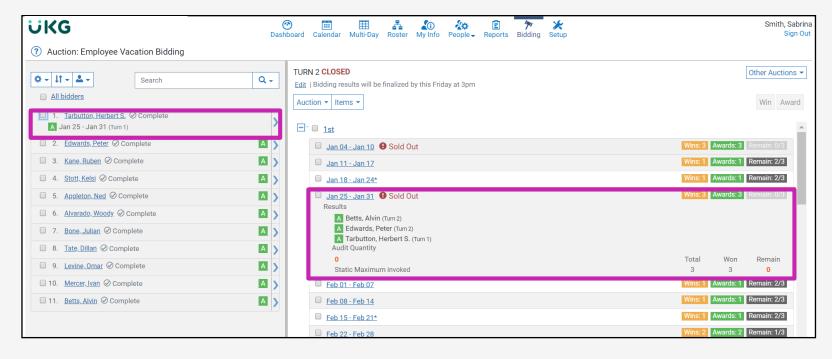


Bid Phases

Three bid process phases: bid, win and award.

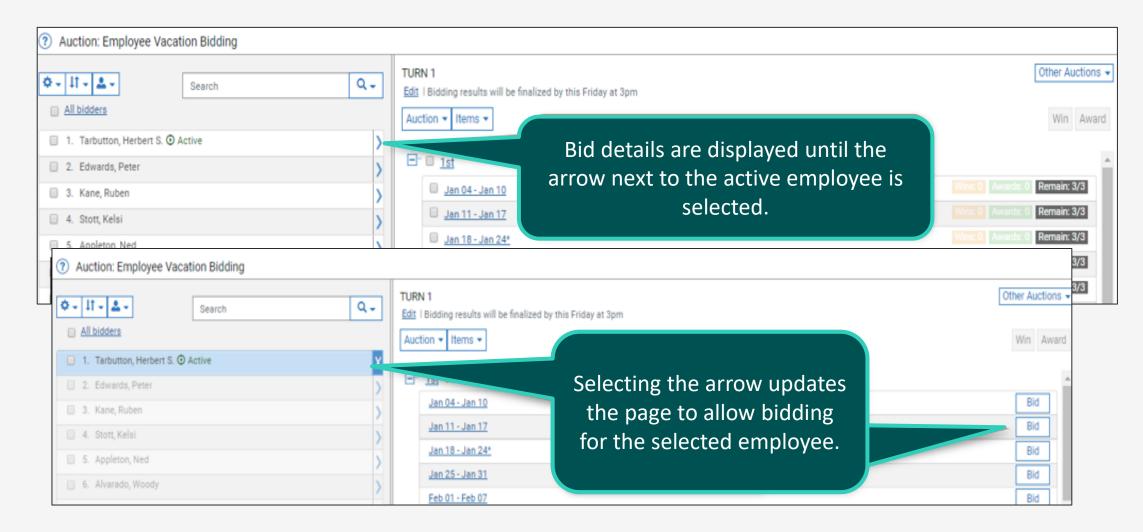
Select bid items to view details







Queue Style Bidding

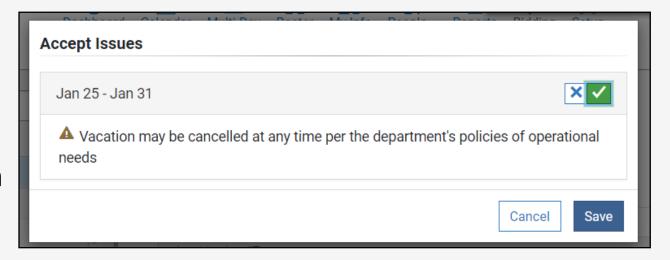


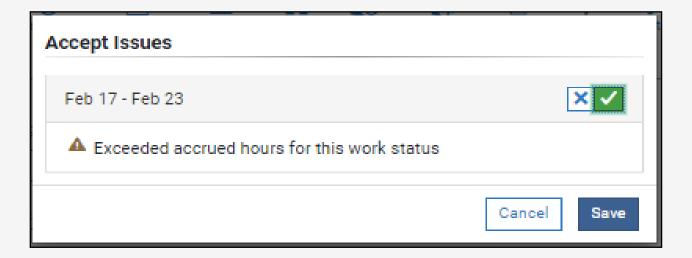
Dynamic and Static Issues

Issues may serve as a warning or a disclaimer to the employee

Issues may prevent the employee from bidding

Issues may be overridden by a bid administrator





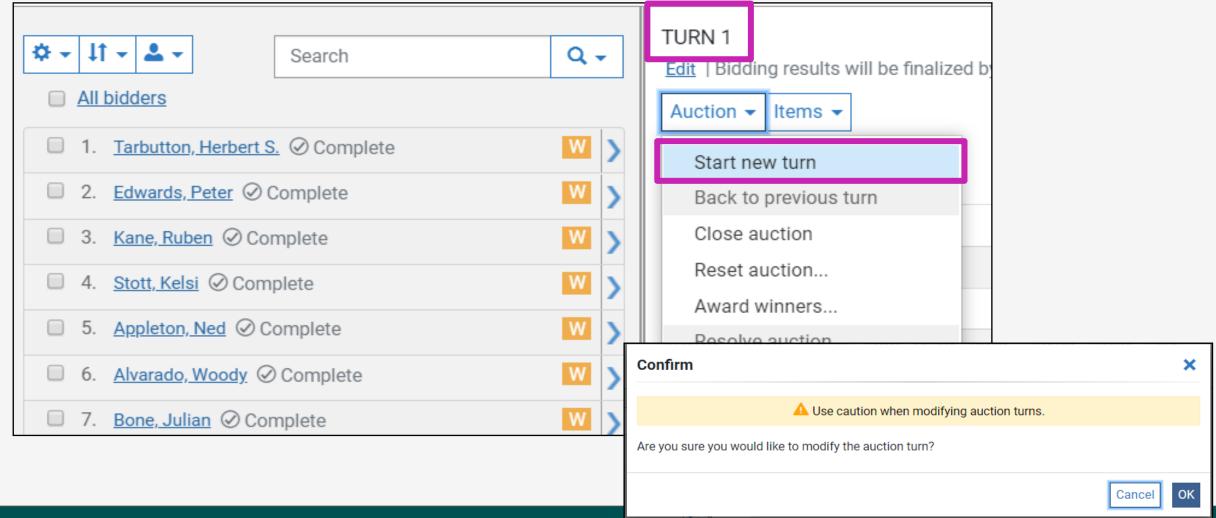
Bid in a Queue Bid Exercise

Exercise 1 – Bid for Employees



Start a New Turn

Bids may have multiple turns or rounds.

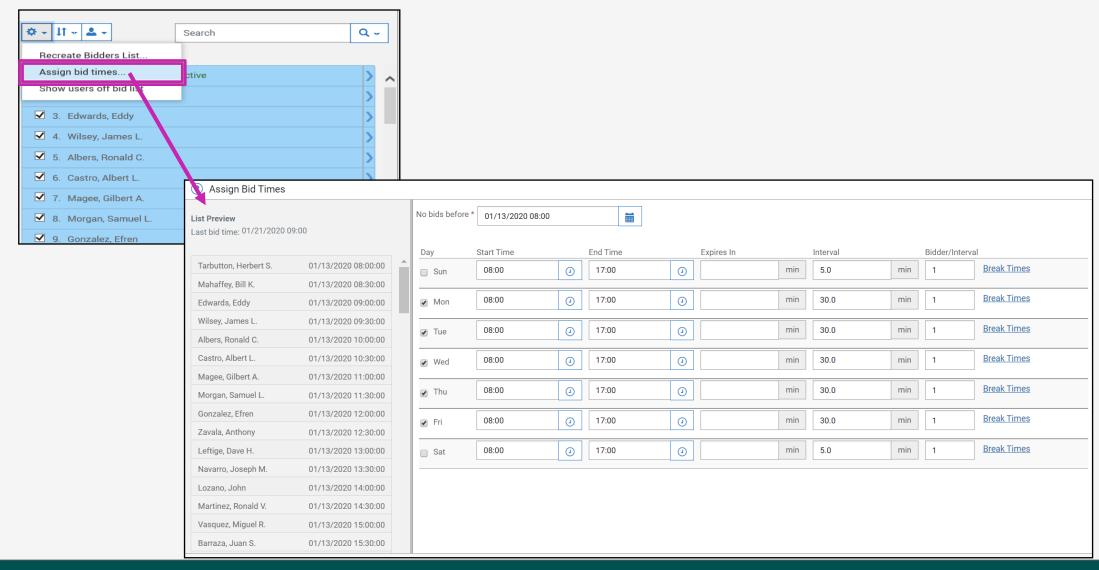


Start a New Turn Exercise

Exercise 2 – Start a New Turn

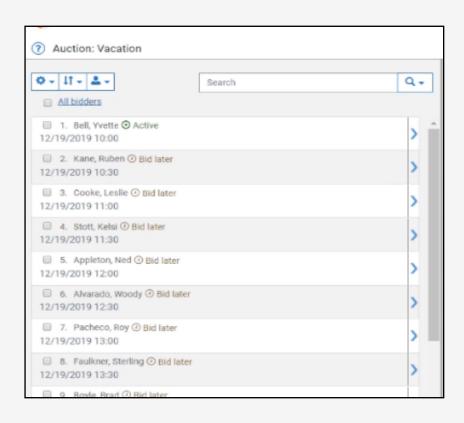


Set Bid Times Demonstration

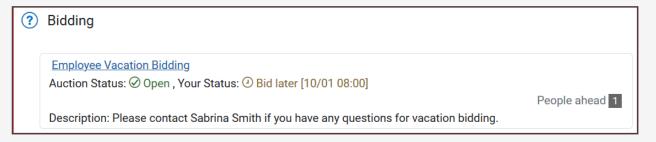


Set Bid Times cont.

Bid times are assigned and visible to each employee Notification sent







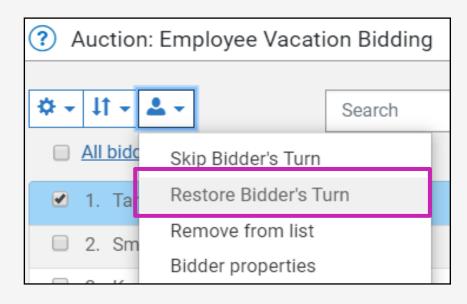
Set Bid Times Exercise

Exercise 3 – Set Bid Times

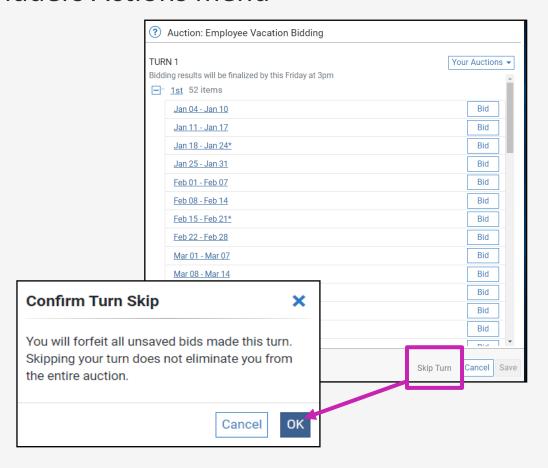


Skip Turns

Bid administrator skips for employee via Bidders Actions menu



Bid administrator skips for employee via Bidders Actions menu



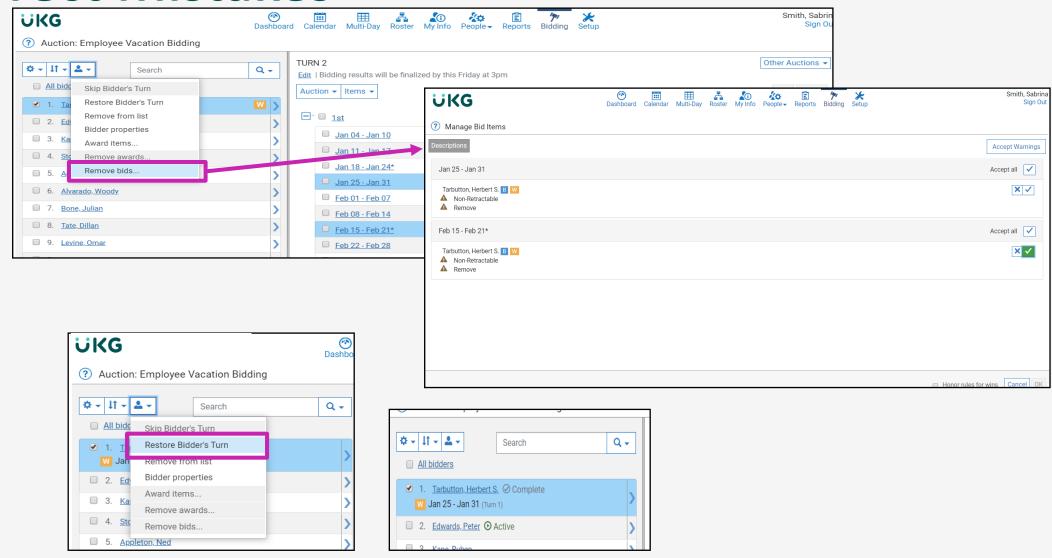
Skip Turns Exercises

Exercise 4 – Skip Turn as Bid Administrator

Exercise 5 – Skip Turn as Employee



Correct Mistakes

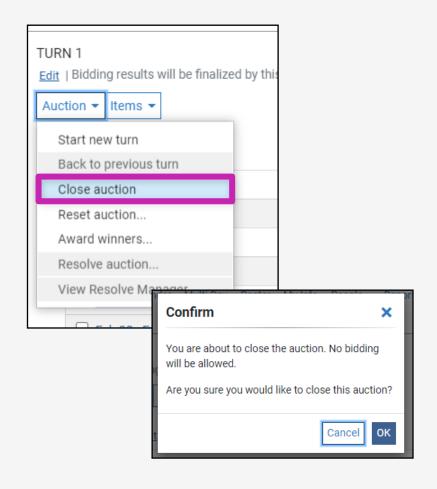


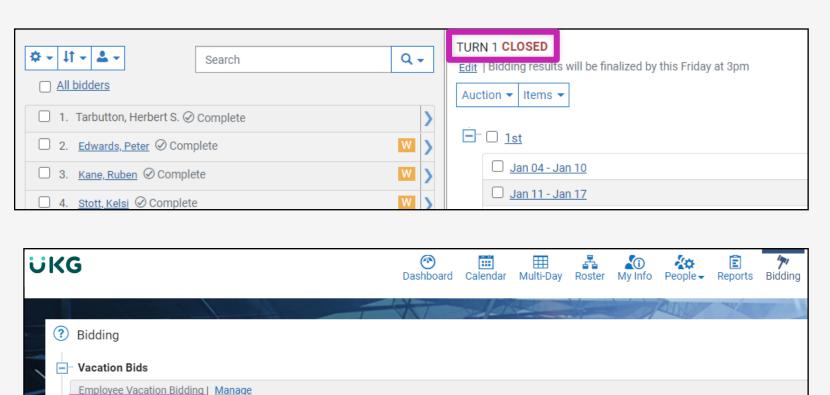
Correct Mistakes Exercises

Exercise 6 – Retract a Bid and Restore a Turn



Close the Bid





Auction Status: (*) Closed

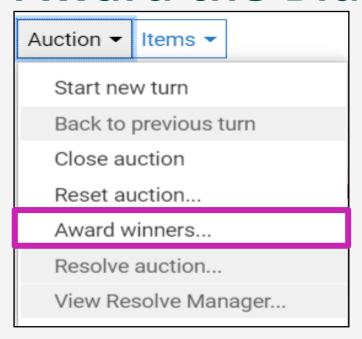
Description: Please contact Sabrina Smith if you have questions for Vacation bidding.

Complete the Bid Exercise

Exercise 7 – Close the Bid

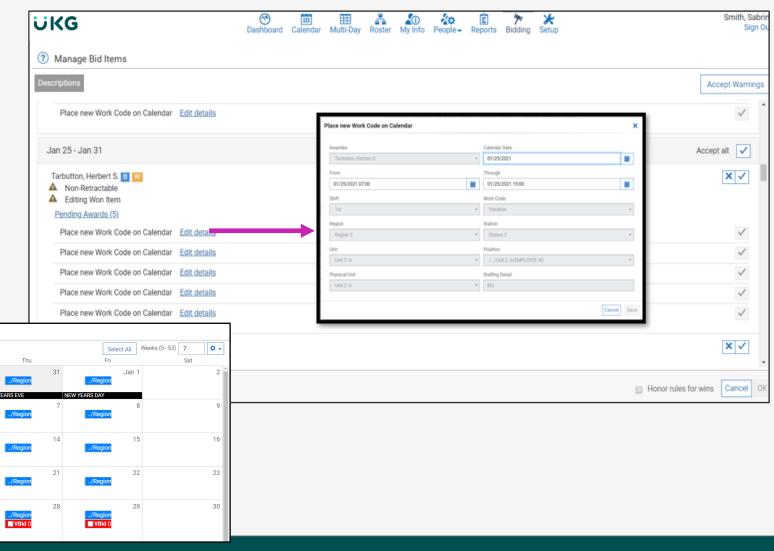


Award the Bid



? Calendar Personal Advanced List Threshold

January 2021 My Calendar Tarbutton, Herbert S.

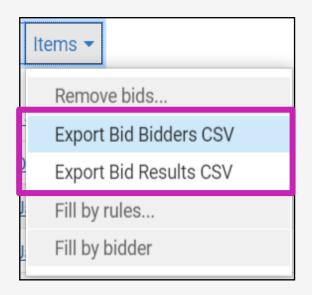


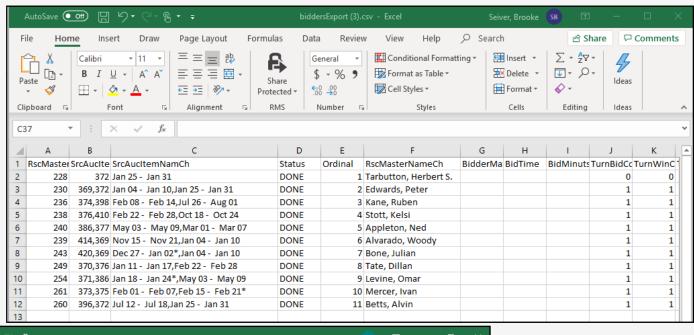
Award the Bid Exercise

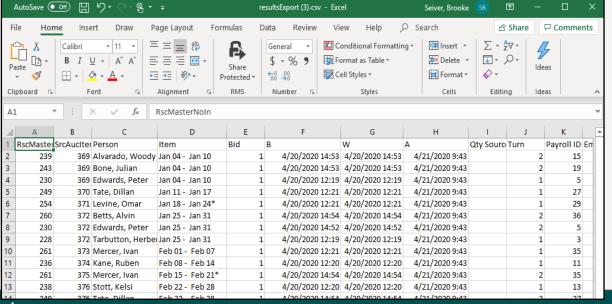
Exercise 8 – Awarding the Bid



Archive the Bid









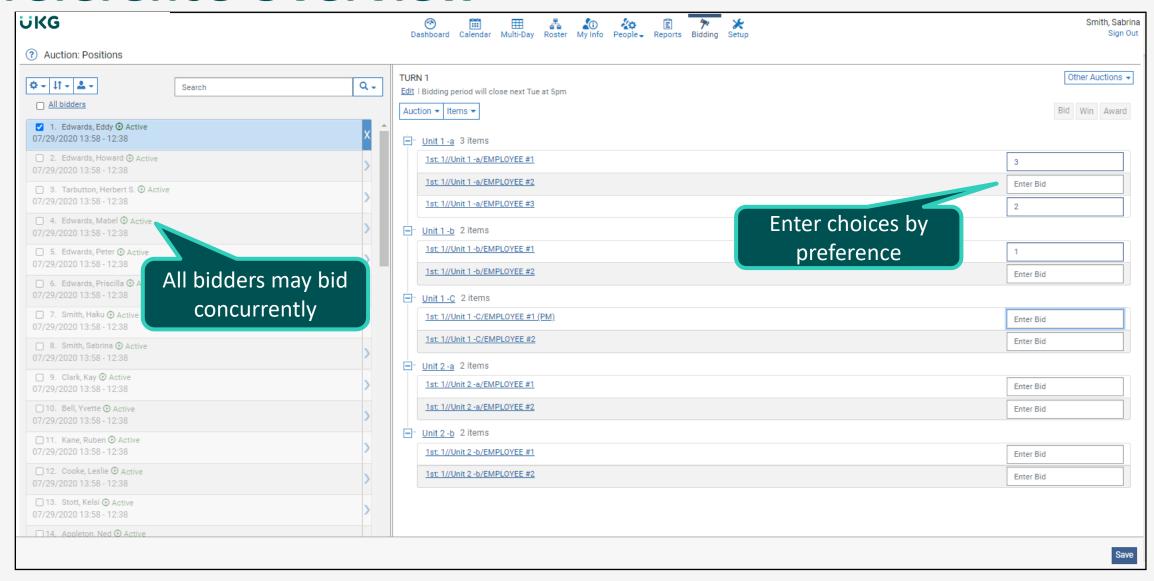
Archive the Bid Exercise

Exercise 9 – Export Bid Results



Preference Bidding and Advanced Bidding Topics

Preference Overview

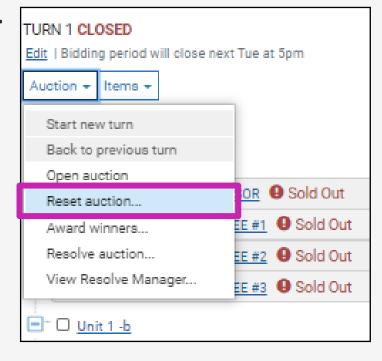


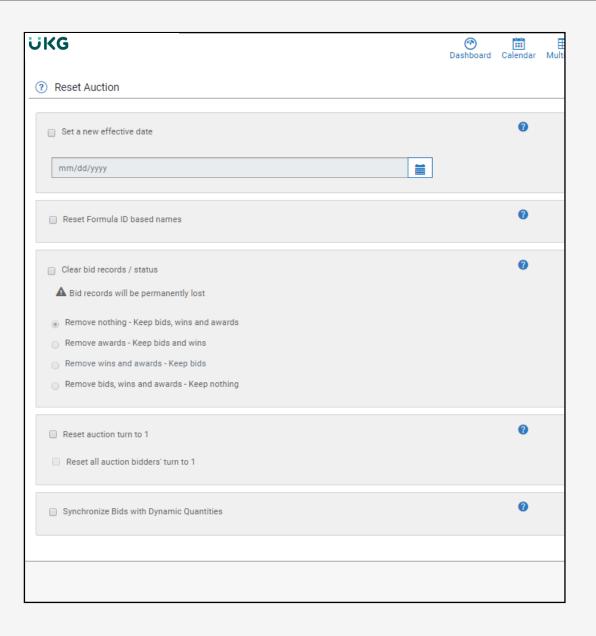
Reset the Bid

Resetting the bid allows bid administrators to reuse a bid for a future bid.

Redefine dates people bid in the manage

bidding area.





Reset the Bid Exercise

Exercise 10 – Resetting the Bid

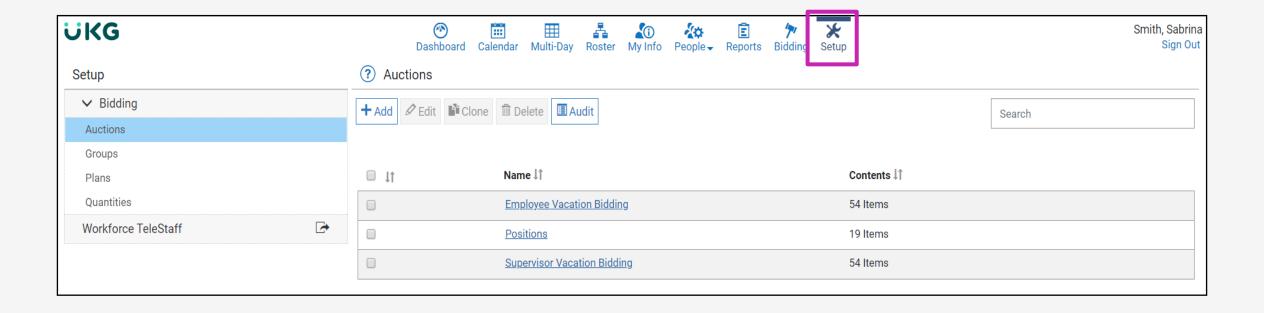


Update and Validate Bid Items

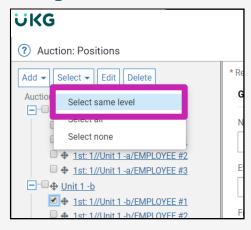
Items may be removed from the bid either temporarily or permanently.

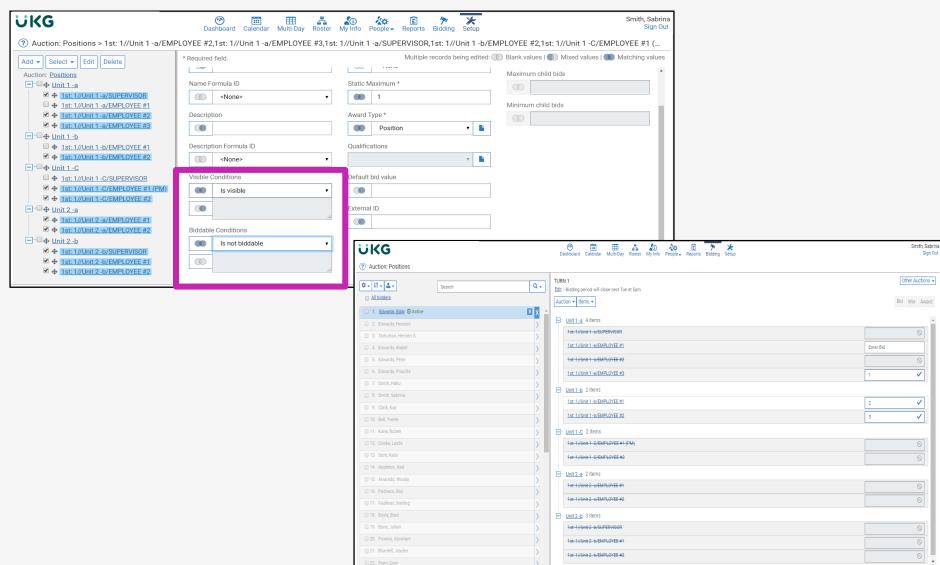
• Common for a position bid, possible for dates in a vacation bid.

Remove bid items for bidding by hiding the items within setup.

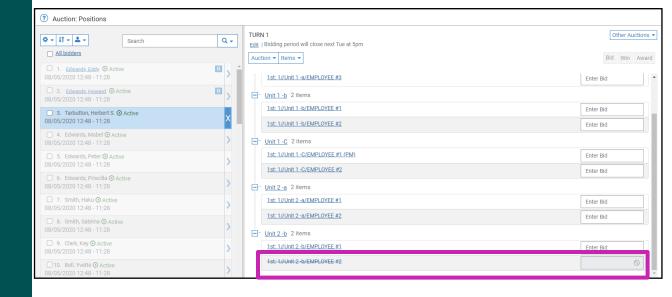


Update and Validate Bid Items



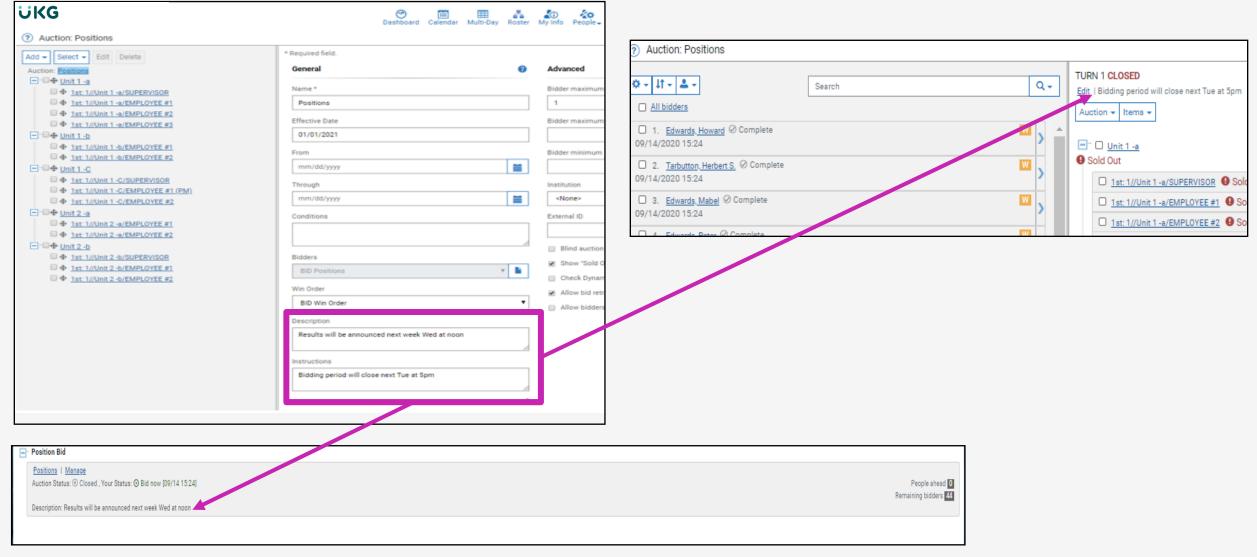


Exercise 11 – Make a Position Visible But Not Biddable





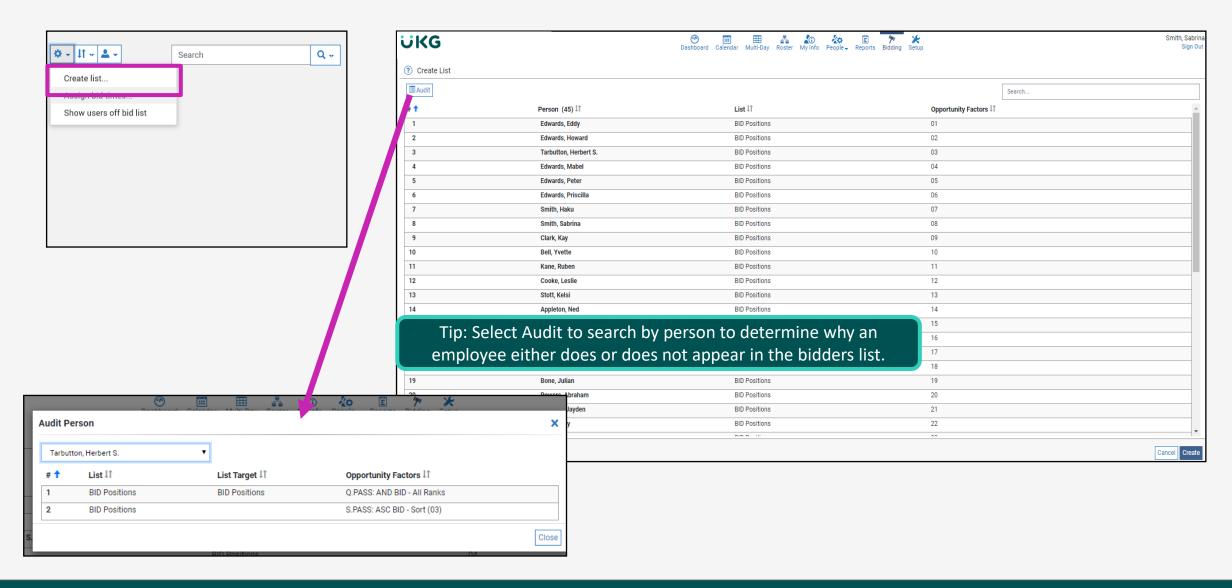
Description and Instruction Fields



Exercise 10 – Resetting the Bid



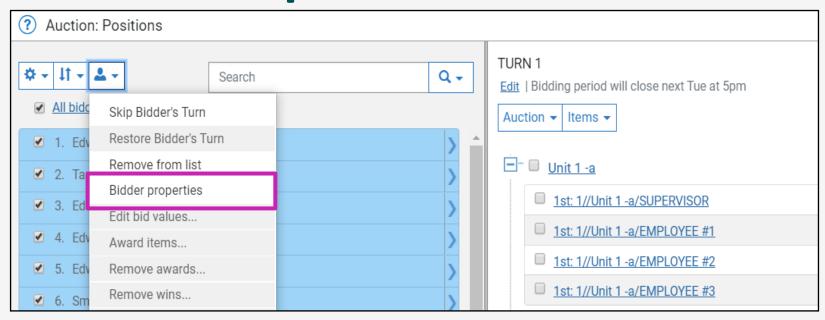
Create or Redraw Bidders list

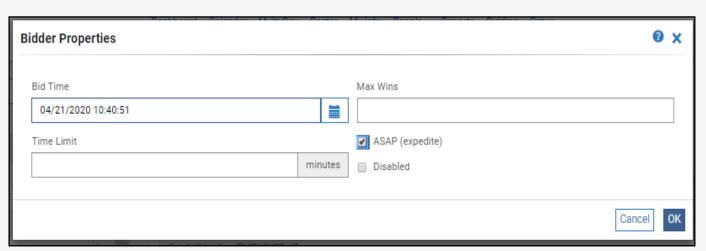


Exercise 13 – Redraw Bidders List



Bidders Properties



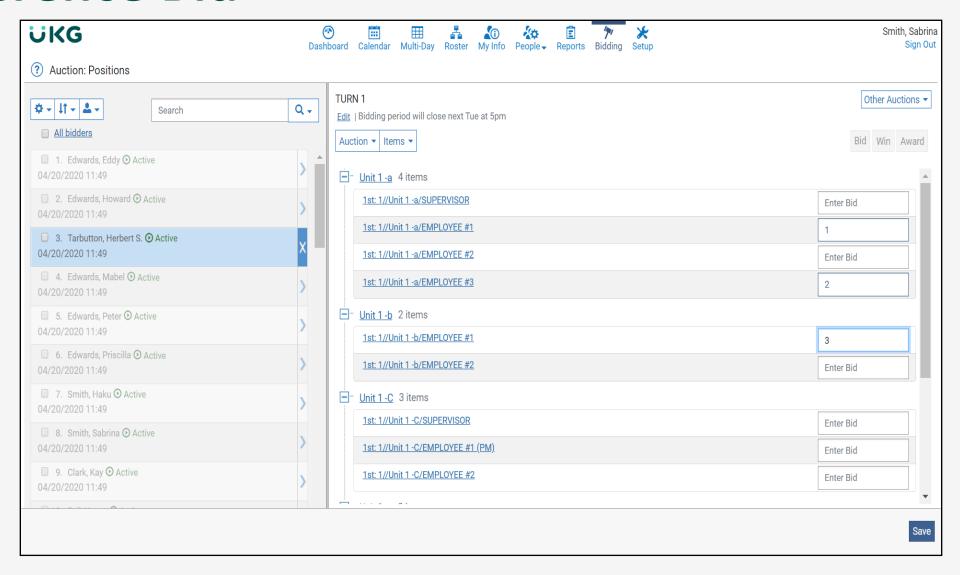


Exercise 14 – Bidder Properties





Preference Bid



Preference Bidding Exercise

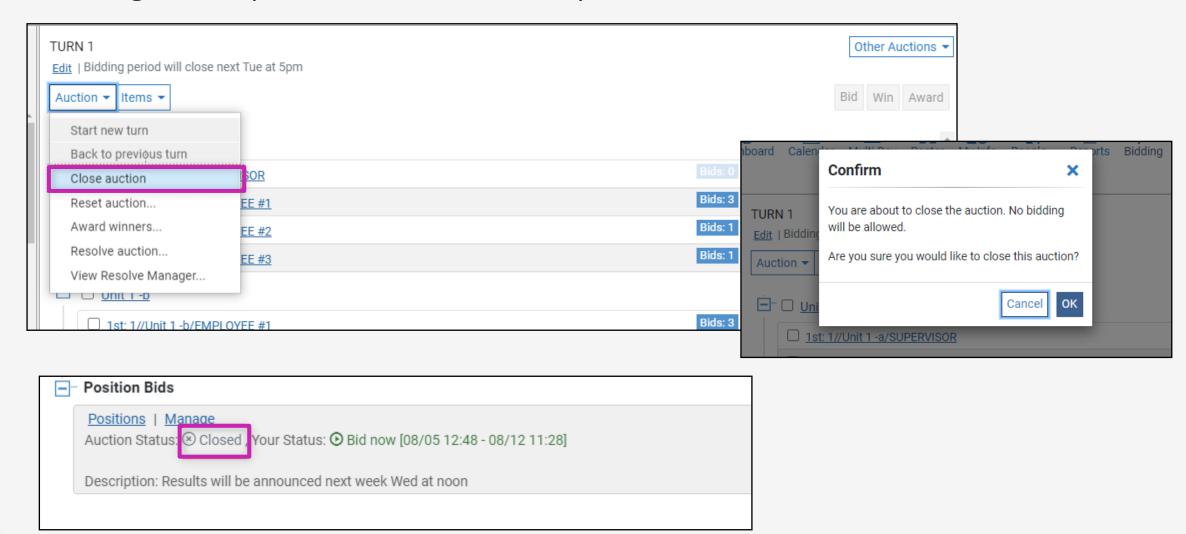
Exercise 15 – Bid!

	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
Ц		



Close the Bid

Closing the bid prevents further action by bidders.

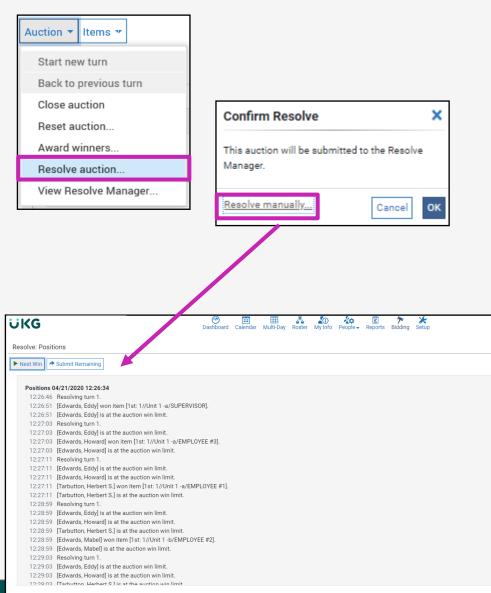


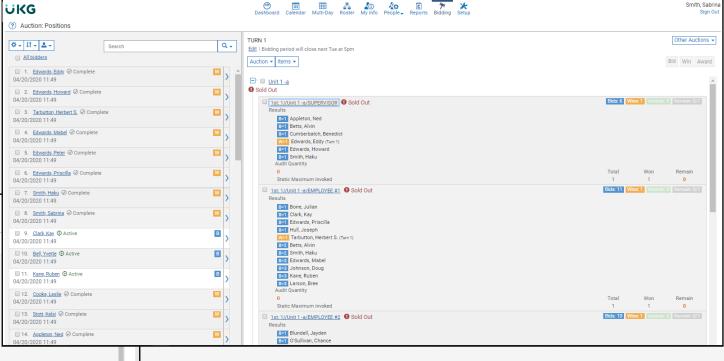
Manage a Bid Exercise

Exercise 16 – Close the Bid



Resolve the Bid



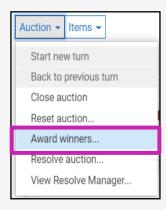


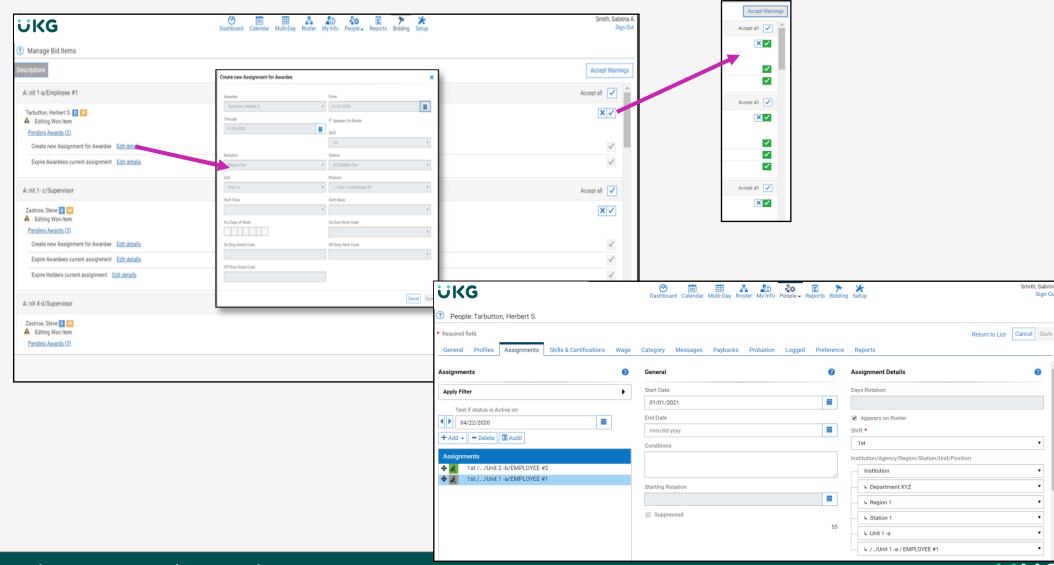
Manage a Bid Exercise

Exercise 17 – Resolve



Award the Bids





Manage a Bid Exercise

Exercise 18 – Awarding



