



Creating Preference-Type Auctions

Bidding Module



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What is a Preference Auction?

Preference auctions are typically used to bid on either one item or a group of items, called Auction Items. The main difference between queue and preference auctions is the manner of how users bid and how the auction awards bidders their selections. A preference auction allows all bidders to bid concurrently. Awarding takes place once all bidding is complete. When users bid, they number their choices based on preference. During the awarding process, the auction awards items to users based on hierarchy and preferences. The auction uses the supplied “Win Order” list of candidates to find the most senior bidder, review his selections and award based on the numbered preferences. The auction moves on to the next most senior bidder, reviews his preference selections and awards based on his preferences and item availability. Preference auctions are typically used for position or shift bidding but can also be used for vacation or work code bidding.

An auction occurs in three phases:

Bid Phase – Bidders enter and number their choices.

Win or Resolve Phase – Bidders are paired with the items won.

Award Phase – The award phase assigns the items won to the bidders.

Create a Preference Auction

Objective – Create a shift or position bid auction to allow employees to select new assignments for the next year.

Create the Bidders List

A preference auction has both a bidders list and a win order list. The bidders list controls who is allowed to bid in the auction. Create Rules, List Target, List, List Chain, and List Plan.

Creating Rules

Rules for Bidding differ from the rules used for Fill by Rules or staffing. Rules for staffing are often dynamic and align with the requirements of the vacancy they are trying to fill. Bidding does not reference a vacancy and therefore uses static rules. When creating People Filter rules, utilize Filter Focus Selections to ensure the rule is static.



Selected: BID Bidder Ranks

* Required Return to List Cancel Save

General Base Rule Usage

Base Rules (?)

Base Rule *
<People Filter>

Rule returns values of type Boolean

Arguments	Values	Argument Values
Profile : Rank : Same As One Of Firefighter,Engineer,Captain,Battalion Chief On Target Date		Profile : Rank Who is Same As One Of

+ Add - Remove

Matches Exactly

On Target Date

Can Act Up OR Down

Skill >= 0.0

Filter Focus *

Selection(s)
4 Selected

Search

Select All

- Battalion Chief
- Captain
- Engineer
- Firefighter

Base Rule Settings (?)

Fast Build via <none>

Build Moment *
TARGET

From

Through

where

Not those identified above

Pass Text

In addition, Build Moment, From and Through are different. Dynamic Arguments used for staffing typically reference the vacancy whereas the typical Dynamic Argument for bid rules is TARGET.

Example List Target

Note: The Work Code field in a list target does not apply to bidding.

General (?)

Name *
BID Position Bidders Target

Work Code *
Comp Time

Detail

15

Rules

Rules

- Qualified If...
- BID Bidder Ranks {10}
- Unavailable If...
- Sort...





Example List

General | Advanced | Outbound

General ⓘ

Name *
BID Position Bidders List 26

Execution Context ⓘ

Execution Context
Bidding

Search

Select All
Roster
Work Code
Bidding

List Targets ⓘ

List Target *	Conditions
BID Position Bidders Target	

+ Add

Rules ⓘ

Rules

- Qualified If...
- Unavailable If...
- Sort...
- BID Seniority (10)

Example List Chain

General ⓘ

Name *
BID Position Bidders Chain

Abbreviation *
BI

Offer Again to Reserved Candidates *
Yes

Restrict

19

Execution Context ⓘ

Execution Context
Bidding

Rules List Conditions ⓘ

List *	Conditions	Merge, Sort w/ Previous List
BID Position Bidd		<input type="checkbox"/>

+ Add

Example List Plan

General ⓘ

Name *
BID Position Bidders Plan 12

Execution Context ⓘ

Execution Context
Bidding

Work Code ⓘ

Assigned * Detail
Comp Time

Mask Day Detail
<none>

Default List Chain

BID Position Bidders Chain

Override Default ⓘ

List Chain	Conditions
No records exist	

+ Add



Create the Win Order List

The win order list is used by the auction during the award phase to determine the hierarchical order of bidders and apply wins correctly. The auction selects the first bidder in the hierarchy, awards their selections and moves on to the next highest bidder, etc. Typically, seniority is used to establish the hierarchy. Create Rules, List Target, List, List Chain, and List Plan.

Creating Rules

The win order rule is very important, paying careful attention to all Argument settings. In addition, note the From and Through fields are set differently.

The screenshot shows the configuration interface for a 'Selected: BID Win Order'. It includes tabs for 'General', 'Base Rule', and 'Usage'. The 'Base Rule' tab is active, showing 'Base Rule' set to 'Auction Item numbers'. Below this is a table of 'Arguments' and their 'Values':

Arguments	Values
Aggregate *	BEST
Target *	BIDS
Limit by Target *	ITEM
Limit by Gray Number	0
Limit by Bid Turn	
COUNT once per parent offset	
Limit by Min Bid Value	
Limit by Max Bid Value	

The 'Argument Values' section is highlighted with a red box and contains the following settings:

- Aggregate *: BEST
- Target *: BIDS
- Limit by Target *: ITEM
- Limit by Gray Number: 0
- Limit by Bid Turn: [empty]
- COUNT once per parent offset: [empty]
- Limit by Min Bid Value: [empty]
- Limit by Max Bid Value: [empty]
- Return Value *: BID

The 'Base Rule Settings' section is also highlighted with a red box and contains:

- Fast Build via: <none>
- Build Moment: [empty]
- From *: 2000-01-01
- Through *: NOW
- Where: [empty]
- Not those identified above
- Pass Text: [empty]

Example List Target

Note: The Work Code field in a list target does not apply to bidding.



General ?

Name *
BID Win Order

Work Code *
Comp Time

Detail

16

Rules

Rules

- Qualified If...
- BID Win Order {10}
- Unavailable If...
- Sort...

Example List

General ? **Advanced** **Outbound**

General

Name *
BID Win Order List

27

Execution Context ?

Execution Context
Bidding

Recording

Recording Audio: To record call Workforce TeleStaff. To bypass the menu options enter: 3, 7, 10, then enter the gray number for the selected record which is 27.

List Targets

List Target *	Conditions
BID Win Order	

Rules

Rules

- Qualified If...
- Unavailable If...
- Sort...
- BID Seniority (10)
- BID Win Order (10)

Example List Chain

General ? **Execution Context** ?

Name *
BID Win Order Chain

Abbreviation *
BI

Offer Again to Reserved Candidates *
Yes

Restrict

20

Execution Context

Execution Context
Bidding

Rules List Conditions

List *	Conditions
BID Win Order List	





Example List Plan

General ?	Default List Chain				
Name * <input type="text" value="BID Win Order Plan"/>	<input type="text" value="BID Win Order Chain"/>				
13	? Override Default				
Execution Context ?	<table border="1"><thead><tr><th>List Chain</th><th>Conditions</th></tr></thead><tbody><tr><td colspan="2">No records exist</td></tr></tbody></table>	List Chain	Conditions	No records exist	
List Chain	Conditions				
No records exist					
Execution Context <input type="text" value="Bidding"/>	<input type="button" value="+ Add"/>				

Create the Auction

1. From the **Setup** menu on the left, select **Bidding** and then **Bidding**.

The screenshot shows two parts of the software interface. On the left, the 'Auctions' window is open, displaying a list of auction types: Captain Vacations, Engineer Vacations, FireFighter Vacations, and Open Positions. The 'Add' button at the top of this window is highlighted with a red box. On the right, the 'Setup' menu is visible, with the 'Bidding' option highlighted with a red box.

2. In the **Auctions** folder click the **Add** button in the **Auctions** window to create a new auction.



3. Name the auction “**Position Auction**”.
4. **Effective Date** defines the Start Date of a bidders newly awarded assignment. This can be defined with an ordinary date definition or with dynamic dates. *Note: Best practices is to use an actual date in the Effective Date.*
5. **From**, **Through** and the **Conditions** field determine when the actual bidding for the vacation days can occur. *Leave these blank for this exercise.*
6. Add the previously created **BID Position Bidders Plan** to the **Bidders** field.
7. Add the previously created **BID Win Order Plan** to the **Win Order** field
8. The **Description** and **Instructions** fields located below **Win Order** are text fields to provide information to the bidders during the bidding process. The fields have no impact on the outcome of the auction.
9. In the **Bidding** section, select **Preference** from the **Bid Method** drop-down.
10. **Check** the following checkboxes:
 - **Auto order bids [1-x]** – Allows the auction to automatically arrange bids in the order selected by the bidder.
 - **Run rules once per winner** – Limits the auction to run the list plan rules once per winner.
11. In the **Advanced** section, enter **1** in the **Bidders maximum wins per auction** field.



12. Check the following checkbox:

- **Allow bidders to skip their personal turn** – When checked, bidders are able to skip their turn. The user would simply log into the auction and select **Skip Turn**.

The screenshot shows the 'Edit Auction: A Shift Vacation' window. On the left, there is a sidebar with buttons: 'Add', 'Delete', 'Edit', 'Select', 'Child', 'Sibling', 'Clone', and 'Generate items...'. The 'Generate items...' button is highlighted with a red box. The main area is divided into 'General' and 'Advanced' sections. The 'General' section has fields for 'Name *' (A Shift Vacation), 'Effective Date' (01/01/2017), and 'Bidder maximum' (wins per auction). The 'Advanced' section has a 'Bidder maximum' field (wins per turn).

13. To create the positions, on the left side of the **Edit Auction** window, click the **Add** drop-down and select **Generate items...**

The screenshot shows the 'Generate Items' window. The 'Generate Item Award Type *' dropdown is set to 'Position' and is highlighted with a red box. Other options include 'Include Additional Properties (show all)' (4 selected), 'Generate Names' (checkbox), 'Include Organization Level(s)' (Station), 'From' (TARGET), and 'Through' (TARGET+6months).

14. The **Generate Items** window appears. From the **Generate Item Award Type** drop-down select **Position**.

The screenshot shows the 'Generate Items' window with the 'Include Additional Properties (show all)' dropdown menu open. The menu items are: Include Organization Level(s), From, Through, Shift, Institution, Agency, Region, and Station. 'Shift' and 'Region' are highlighted.

15. In the **Include Additional Properties** drop-down, the selections of **Include Organizational Level(s)**, **From**, **Through** and **Shift Positions Only** are already selected, also select **Shift** and **Region**. The Properties section now changes. *Note: The Include Additional Properties is very important as it allows the narrowing down of what levels of the organization structure and shift are to be included in an auction. For example, if the database includes an Administrative region and shift that should not be included, selecting those properties allows their removal.*





Generate Items

Generate Item Award Type *
Position

Include Additional Properties (show all)
8 selected

Generate Names

Properties

Include Organization Level(s)
2 selected

From
TARGET

Through
TARGET+6months

Shift
3 selected

Institution
FD Institution

Agency
Catalina Fire Department

Region
Battalion 140

Shift Positions Only

16. In the **Properties** section, under the **Include Organizational Level(s)** drop-down, **unselect Station** and select **Shift** and **Unit**. *Note: The Include Organizational Level(s) items are very important and define how the auction organization structure is laid out. In this auction, the first level is A Shift and within A Shift, are units that have positions available for bidding. Below A Shift, again at the highest level, is B Shift and all units within B Shift, etc.*
17. In the **Shift** drop-down, only select shifts that have positions available for bid, select **A Shift**, **B Shift** and **C Shift**.
18. In the **Region** drop-down, only select the region(s) that have positions available for bid. *This adds Institution and Agency drop-down fields. Based on the regions selected, Institution and Agency are populated with the correct org levels.*

Include Organization Level(s)
2 selected

From
TARGET

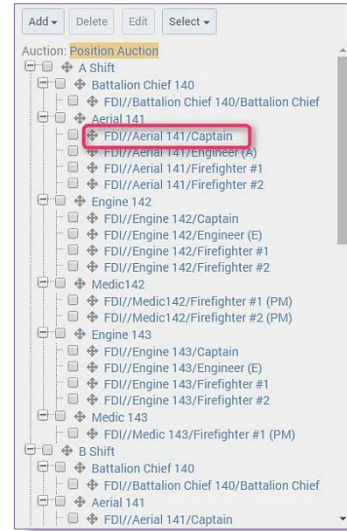
Through
TARGET+6months

19. The **From** and **Through** in a position auction define the Start and End Dates of a new assignment. By default, assignments will end 6 months after the start date. *Best practice is to remove the Through date and let the users next new assignment drive the ending date of this assignment.*
20. **Save.**

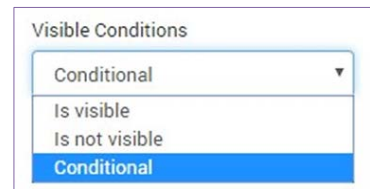


21. All positions are created on the left. Notice how all A Shift units/positions are at the top, followed by B Shift and C Shift.

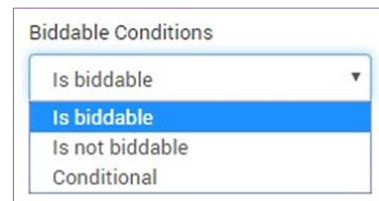
22. Click on any position to view the position properties.



23. The **Visible Conditions** field defines the job titles that can view the position. Click on the **Visible Conditions** drop-down to view selections. The selections are **Is visible**, **Is not visible** and **Conditional** (to utilize a Dynamic Argument to define when visible).



24. Click the **Biddable Conditions** drop-down to view the selections. The selections are **Is biddable**, **Is not biddable** and **Conditional** (to enter a Dynamic Argument to define when biddable).



25. Click on the **Award Type** field's paper icon to bring up the **Award Properties** window.



Award Properties

Include Additional Properties (show all)
10 selected

Properties

Award What *
Position

From
TARGET

Appears On Roster

Shift
A Shift

Institution
FD Institution

Agency
Catalina Fire Department

Region
Battalion 140

Station
Station 141

Unit
Battalion Chief 140

Position
/.../Battalion Chief 140/Battalion Chief

For Days of Week
7 selected

Awardee's Concurrent Assignment *
Expire

Current Holder's Assignment *
Expire

26. The **Awardee's Concurrent Assignment** defines the system action on the awardee's current assignment. **Click** on the field's drop-down:

- **Ignore** – Do not make any changes to the awardee's current assignment.
- **Expire** – Enter an End Date into the awardee's current assignment.
- **Delete** – Remove the awardee's current assignment.

27. The **Current Holder's Assignment** defines the system action for the user currently assigned to the awardee's new assignment. **Click** on the field's drop-down:

- **Ignore** – Do not make any changes to the current assignment holder's assignment.
- **Expire** – Enter an End Date into the current assignment holder's assignment.
- **Delete** – Remove the current assignment holder from the assignment by removing their assignment.

28. **Cancel. Save** or **Cancel** out of auction.

Create the Auction Plan

1. Move to **Plans** in the **Setup** window on the left.
2. Add a new plan by clicking the **Add** button



General

Plan Status: **Enabled** Disabled

Name *
Position

From Date: mm/dd/yyyy

Through Date: mm/dd/yyyy

Dynamic Conditions

Plan Conditions

Add

Auction: Position Auction

Conditions

3. Enter a name for the plan, **Position**.
4. **Click** the **Add** button to add the newly created position auction.
5. **Save**.

View Results and Manage Action

1. From the **Navigator** at the top, select **Bidding** to view the auction on the front end.

Bidding

Vacation

- A Shift Vacation | Manage
Auction Status: Open

Position

- Position Auction | **Manage**
Auction Status: Open

2. Select **Manage** to manage the auction. *Selecting the auction itself provides access to the auction as a bidder only.*
3. The list of auction bidders is blank until the bidders list is created. Create the list by clicking on the **gear icon** on the left side and from the drop-down select **Create List...**

Create List

Audit

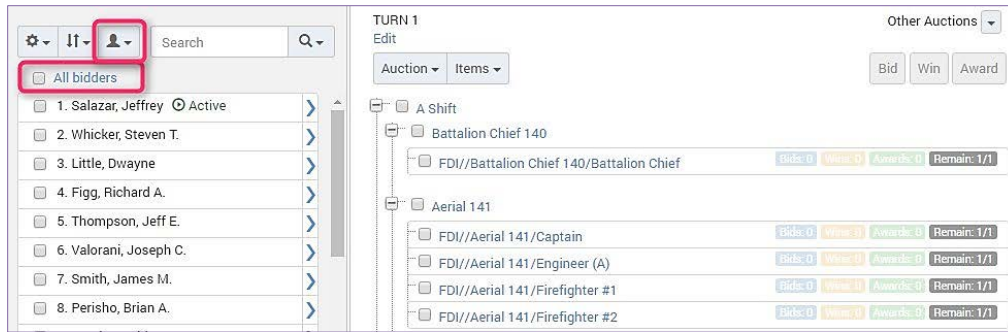
Search...

#	Person (55)	List	Opportunity Factors
1	Salazar, Jeffrey	BID Position Bidders List	104.0
2	Whicker, Steven T.	BID Position Bidders List	112.0
3	Little, Dwayne	BID Position Bidders List	114.0
4	Figg, Richard A.	BID Position Bidders List	117.0

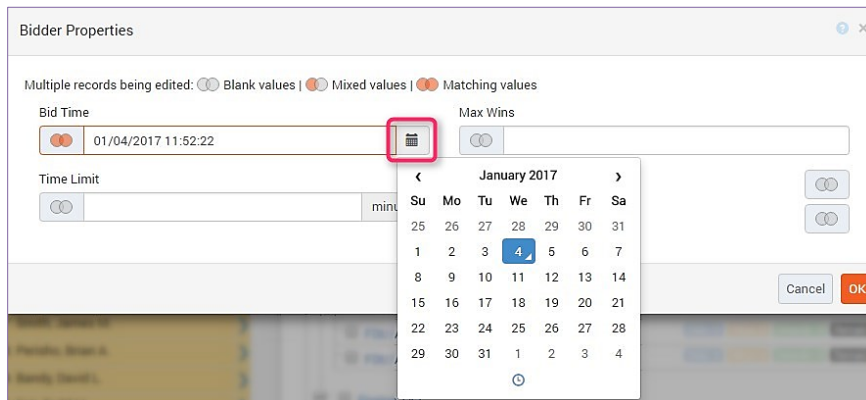
Cancel Create



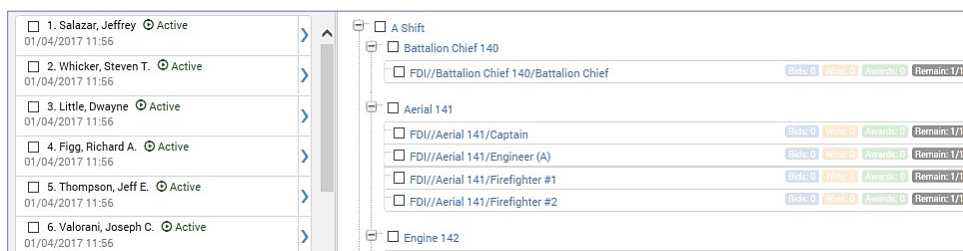
- The **Create List** window appears. Confirm the list is correct and click the **Create** button at the bottom right.



- Once the bidders populate, note the auction is set up by default to allow bidders to bid one at a time.
- To enable all bidders to bid at once, check the **All bidders** checkbox, to select all bidders.
- From the **head icon** drop-down, select **Bidder properties**.
- The **Bidder Properties** window appears.

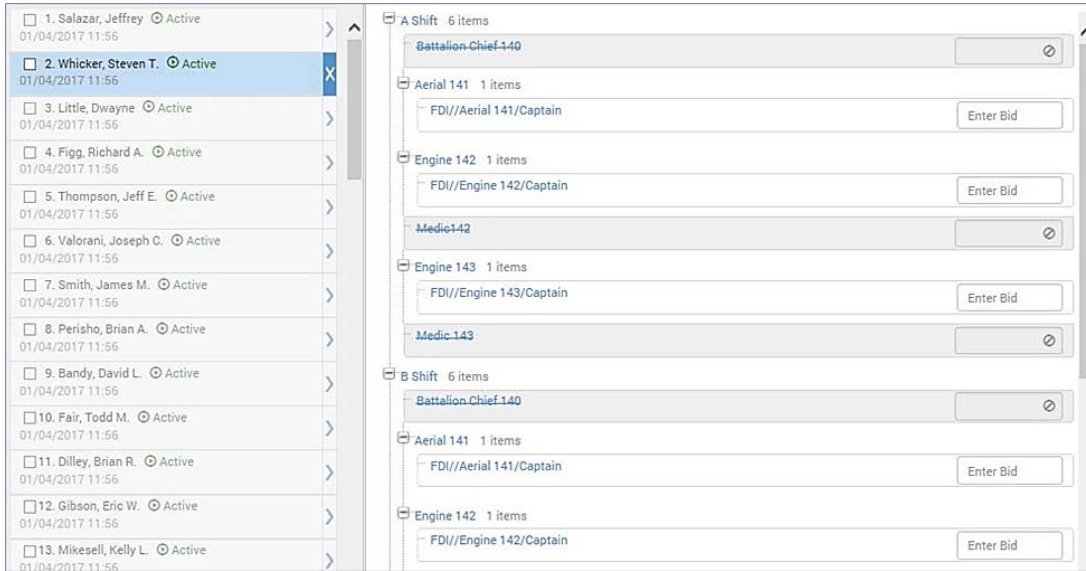


- Click on the **calendar icon** at the **Bid Time** field and select **today's date**. **OK**.



- The auction is now set for all bidders to bid.



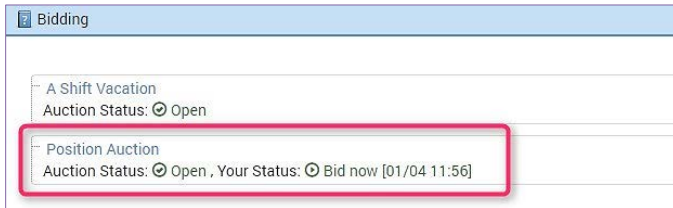


11. Click on various bidder's **blue arrow** to view the auction from their standpoint.

Test the Auction, Begin to Bid

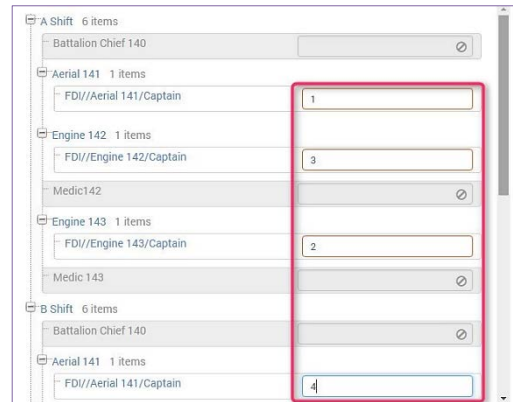
Best practice: Always test an auction to verify it is functioning as expected.

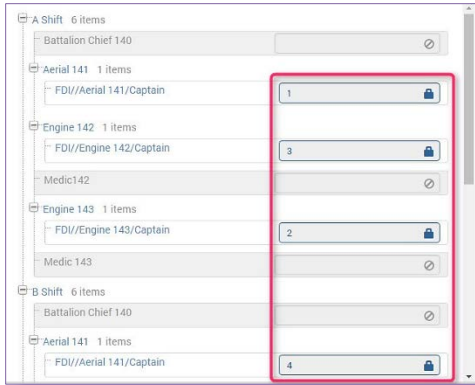
1. Log in as a bidder, and from the **dashboard**, select **Bidding**.



2. Notice the **Position Auction** provides the status that the bidder is eligible to **Bid now**. Select the **Position Auction** to start bidding.

3. **Bid** and **number** position preferences. When finished, click **Save**.

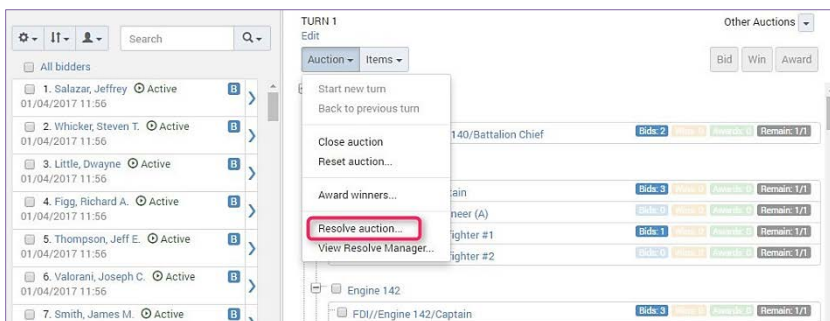




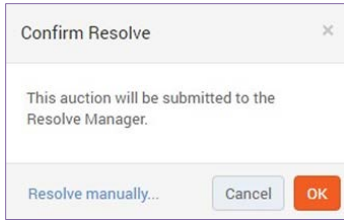
4. Since **Allow bid retraction** was not checked, selections are now locked in.
5. Log back in as the **Administrator** and from the **Navigator** at the top, select **Bidding** and at the **Position Auction**, select **Manage**.
6. Begin bidding on positions for the users. Notice the **B** icon to the right of some bidders. This indicates the user has already bid.

<input type="checkbox"/>	1. Salazar, Jeffrey	Active	B	>
<input type="checkbox"/>	2. Whicker, Steven T.	Active	B	>
<input type="checkbox"/>	3. Little, Dwayne	Active	B	>
<input type="checkbox"/>	4. Figg, Richard A.	Active	B	>
<input type="checkbox"/>	5. Thompson, Jeff E.	Active	B	>
<input type="checkbox"/>	6. Valorani, Joseph C.	Active	B	>
<input type="checkbox"/>	7. Smith, James M.	Active	B	>
<input type="checkbox"/>	8. Perisho, Brian A.	Active	B	>
<input type="checkbox"/>	9. Bandy, David L.	Active	B	>
<input type="checkbox"/>	10. Fair, Todd M.	Active	B	>
<input type="checkbox"/>	11. Dilley, Brian R.	Active	B	>

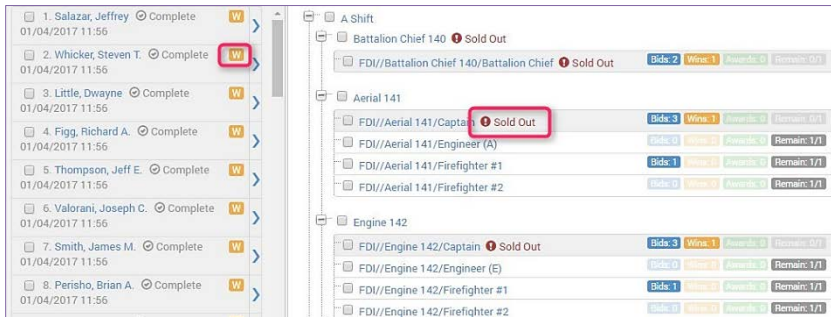
Resolve the Auction



1. When finished, select **Resolve auction....** from the **Auction** drop-down.



2. The **Confirm Resolve** window appears, select **OK**.

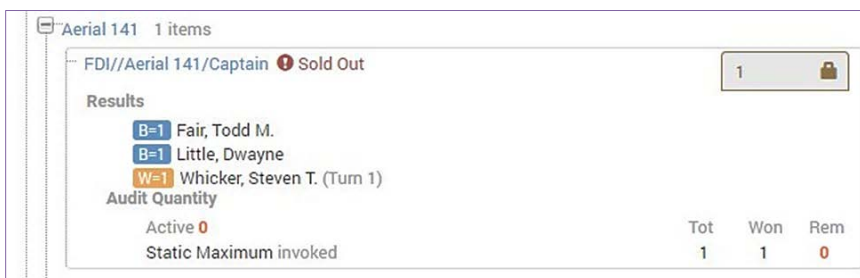


3. When completed, the **W** icon displays indicating the user has won an auction item, and on the right, the positions won are shown as **Sold Out**.



4. **Click** on a bidder's **blue arrow** to see what the bidder won. The won item's **lock icon** is **burgundy**. In this case, **Steven Whicker** has won the **Aerial 141 Captain** position.

5. **Click** on the **Aerial 141 Captain** position.

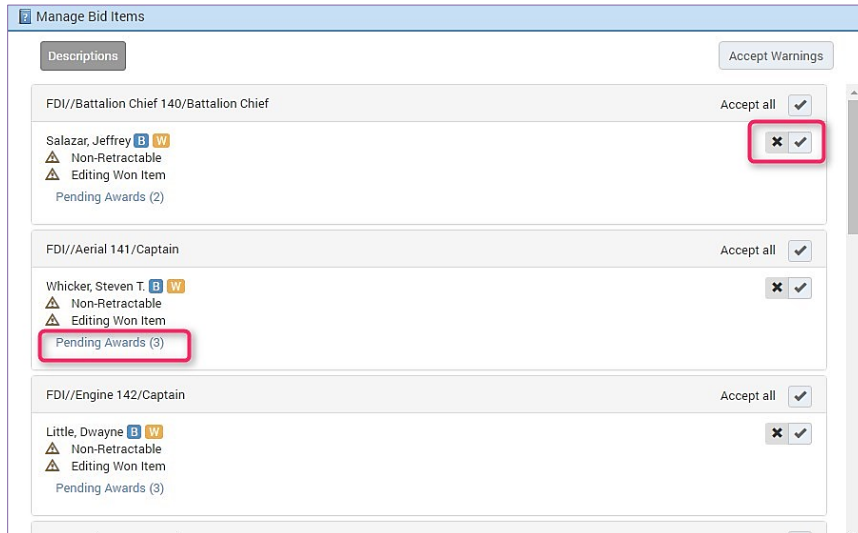




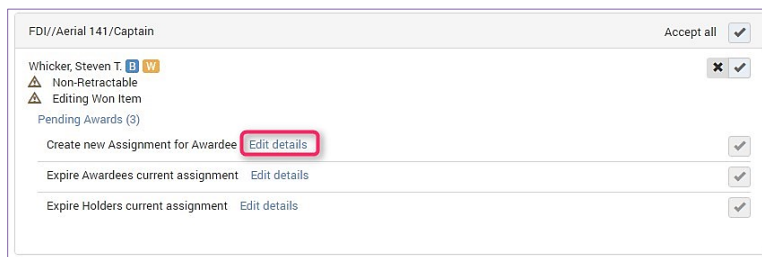
- The auction **results** appear. In this example, Todd Fair, Dwayne Little and Steven Whicker bid on this position and Whicker won it.

Award Auction Winners

- To **award** the positions to the bidders, select **Award winners....** from the **Auction** drop-down.



- The **Manage Bid Items** window appears. Click on the **Pending Awards** link to view what the auction intends to do.



- Details appear. Click on the **Edit details** link for further information.



Create new Assignment for Awardee

Awardee: Whicker, Steven T. From: 01/01/2017

Through: []

Region: Battalion 140 Station: Station 141

Unit: Aerial 141 Position: FDI//Aerial 141/Captain

Shift: A Shift

Shift Time: []

For Days of Week: Su M T W Th F Sa

Off Duty Work Code: []

Off Duty Detail Code: []

4. The **Create new Assignment for Awardee** window appears providing additional information. **Cancel** and view the other **Edit details** links.

FDI//Aerial 141/Captain Accept all [checkmark]

Whicker, Steven T. [B] [W]

⚠ Non-Retractable [X] [checkmark]

⚠ Editing Won Item

Pending Awards (3)

5. To accept the new assignment for the bidder, click on the **Check icon** to right. To reject, click the **X icon**. *Caution: Accepting any new assignment and selecting OK at the bottom of the window create new assignments in Workforce TeleStaff as well as expire old ones. When testing, these would have to be manually removed from each user.*
6. Click **OK**.

1. Salazar, Jeffrey Complete [A]

2. Whicker, Steven T. Complete [A]

3. Little, Dwayne Complete [A]

4. Figg, Richard A. Complete [A]

5. Thompson, Jeff E. Complete [A]

6. Valorani, Joseph C. Complete [A]

7. Smith, James M. Complete [A]

8. Perisho, Brian A. Complete [A]

9. Bandy, David L. Complete [A]

A Shift

Battalion Chief 140 Sold Out

FDI//Battalion Chief 140/Battalion Chief Sold Out Bids: 2 Wins: 1 Awards: 1 Remain: 0/1

Aerial 141

FDI//Aerial 141/Captain Sold Out Bids: 3 Wins: 1 Awards: 1 Remain: 0/1

FDI//Aerial 141/Engineer (A) Bids: 0 Wins: 0 Awards: 0 Remain: 1/1

FDI//Aerial 141/Firefighter #1 Bids: 1 Wins: 0 Awards: 0 Remain: 1/1

FDI//Aerial 141/Firefighter #2 Bids: 0 Wins: 0 Awards: 0 Remain: 1/1

Engine 142

FDI//Engine 142/Captain Sold Out Bids: 3 Wins: 1 Awards: 1 Remain: 0/1

FDI//Engine 142/Engineer (E) Bids: 0 Wins: 0 Awards: 0 Remain: 1/1

FDI//Engine 142/Firefighter #1 Bids: 1 Wins: 0 Awards: 0 Remain: 1/1

FDI//Engine 142/Firefighter #2 Bids: 0 Wins: 0 Awards: 0 Remain: 1/1



- The auction bidders show the **A icon** indicating an awarded auction item, and on the right, awarded positions show a **green Awards icon**.
- Move over to **Steven Whicker's** personal information to view his new **assignment**.

General Profiles Assignments Messages Paybacks Probation Logged Preference

Assignments

Apply Filter(s)

Test if status is Active on

01/04/2017

+ Add - Delete Audit

Assignments

- A /.../Engine 142/Captain
- A /.../Aerial 141/Captain

General

Start Date

mm/dd/yyyy

End Date

12/31/2016

Conditions

Starting Rotation *

Suppressed

- Whicker now has two assignments. This first with an **End Date** of **12/31/2016**.

General Profiles Assignments Messages Paybacks Probation Logged Preference

Assignments

Apply Filter(s)

Test if status is Active on

01/04/2017

+ Add - Delete Audit

Assignments

- A /.../Engine 142/Captain
- A /.../Aerial 141/Captain

General

Start Date

01/01/2017

End Date

mm/dd/yyyy

Conditions

Starting Rotation *

Suppressed

- The second with a **Start Date** of **01/01/2017**.