



Creating Queue-Type Auctions

Bidding Module



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What is a Queue Auction?

A Queue Auction is used to bid for items such as vacation days, kelly days, extra working days. An auction 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.

The Process of a Queue Auction

An auction occurs in three phases:

Bid Phase – Bidders select desired auction items

Win or Resolve Phase – Bidders are paired with the items won. This phase can be performed instantaneously, by round or completed when all rounds are finished.

Award Phase – The award phase places the items won on calendars and rosters. Like the win or resolve phase, awards can be performed instantaneously, by round or completed when all rounds are finished.

In a queue auction, the eligible bidders are ordered based on the desired hierarchy. The auction is configured to allow each bidder to select their items during their turn, beginning with the most senior bidder. The auction can include determining eligibility based on running work code Dynamic Issues and/or Static Issues. Timing of awarding bidders their selections can be instantaneous or at a later time as determined by the auction manager.

Auctions are created with single or multiple rounds.

In a **Queue-type Single Turn Auction**, each bidder selects all items during their turn and the award is instantaneous or granted later by the auction manager.

In a **Queue-type Multiple Turn Auction**, each bidder selects the number of auction items allowed per the configuration during their turn. Each bidder makes their selections in the predefined order until all bidders complete their first turn. When round one is complete, round 2 begins. The award process can be immediate, as each bidder selects “Save”, at the completion of each round, or once all rounds are complete. The number of rounds and auction items selected in each round is determined by the configuration.

Exercise 1 – Create a Simple Queue Method Auction for Vacation Bidding

Objective – Create a vacation auction to allow up to 3 people off per day on A Shift, based on seniority. This is a work code based auction.

Step 1 – Setup Authorities

Configure three new permission settings



Permissions

Settings

None Selected

- Attachment: View
- Auction: Basic**
- Auction: By-pass Manager**
- Auction: Manage
- Auction: Setup**
- Audit: View
- Calendar/Poster Add Code

- **Auction: Basic** is assigned to bidders
- **Auction: Manager** and **Auction: By-pass Manager** is assigned to users that manage auctions
- **Auction: Setup** is assigned to users that create auctions

Step 2 – Create Formula-IDs

Formula IDs control the display of the vacation dates created in an auction. Below are some common examples:

{FromDa} translates to “1/1/2009”

{FromDa mm/dd/yyyy} translates to “01/01/2009”

{FromDa.mmm dd yyyy} translates to “Jan 01 2009”

General

Name *

Vacation Date

Abbreviation *

VD

For *

Bidding

Formula ID *

{FromDa,mm/dd/yyyy}

Context Defined Variables

Search:

Variable	Description
{AwardType}	The type of assignment to be awarded [Position/Template/Template or Position]
{EffectiveDa}	The Effective Date for the Auction [Date]
{FromDa}	The The awards From date [Date-Time]
{InstitutionAbrvCh}	The abbreviation of the assignment's Institution [Text]
{InstitutionNameCh}	The name of the assignment's Institution [Text]
{InstitutionNoln}	The gray number of the assignment's Institution [Number]
{OffWstatAbrvCh}	The abbreviation for assignment's Off Duty Work Code [Text]





Step 3 – Create Bidders List

Create Rules, List Target, List, List Chain, and List Plan. This controls who is allowed to bid and the order in which selections are made.

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.

The screenshot shows a configuration window for a bidding rule. The title bar reads "Selected: BID Assigned to A Shift". There are three tabs: "General", "Base Rule", and "Usage". The "Base Rule" tab is active. In the "Base Rules" section, the "Base Rule" dropdown is set to "<People Filter>". Below it, a note says "Rule returns values of type Boolean". The "Argument Values" section contains several dropdowns: "Assignment : Shift", "Who is" (set to "Same As"), "One Of", "Matches Exactly" (checked), "On Target Date", and "For All Assignments". The "Filter Focus" section has two dropdowns: "Selection(s)" and "A Shift". In the "Base Rule Settings" section, "Fast Build via" is set to "<none>". The "Build Moment" section has a dropdown set to "TARGET", with "From" and "Through" fields below it. The "Where" field is empty. There is a checkbox for "Not those identified above" which is unchecked. A "Pass Text" field is also empty. At the top right, there are buttons for "Return to List", "Cancel", and "Save".

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 *

Work Code *

Detail

13

Rules

Rules

- Qualified If...
- ↑ + BID Assigned to A Shift {10}
- Unavailable If...
- Sort...

Example List

General ?

Name *

12

Execution Context ?

Execution Context

- Select All
- Roster
- Work Code
- Bidding**

List Targets ?

List Target *	Conditions
↑ ↓ BID Bidders Target	<input type="text"/>

+ Add

Rules ?

Rules

- Qualified If...
- Unavailable If...
- Sort...
- ↑ ↓ ¹₂3 BID Seniority {10}



Example List Chain

General ?	Execution Context ?						
Name * <input type="text" value="BID Bidders Chain"/>	Execution Context <input type="text" value="Bidding"/>						
Abbreviation * <input type="text" value="BI"/>	<input type="text" value="Search"/>						
Offer Again to Reserved Candidates * <input type="text" value="Yes"/>	Select All Roster Work Code Bidding						
<input type="checkbox"/> Restrict							
12							
Rules List Conditions ?							
<table border="1"><thead><tr><th>List *</th><th>Conditions</th><th>Merge, Sort w/ Previous List</th></tr></thead><tbody><tr><td><input type="text" value="BID Bidders List"/></td><td><input type="text"/></td><td><input type="checkbox"/></td></tr></tbody></table>	List *	Conditions	Merge, Sort w/ Previous List	<input type="text" value="BID Bidders List"/>	<input type="text"/>	<input type="checkbox"/>	
List *	Conditions	Merge, Sort w/ Previous List					
<input type="text" value="BID Bidders List"/>	<input type="text"/>	<input type="checkbox"/>					

Example List Plan

General ?	Default List Chain				
Name * <input type="text" value="BID Bidders Plan"/>	<input type="text" value="BID Bidders Chain"/>				
3	? 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="text" value="Search"/>				
Select All Roster Work Code Bidding	<input type="button" value="+ Add"/>				





Step 4 - 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 is the 'Setup' menu with 'Bidding' selected. On the right is the 'Auctions' window with the 'Add' button highlighted. Below these is a 'Setup' sidebar with 'Bidding' selected.

Setup
Security
General
Shifts
Logging
Codes
Rules
Roster
Organization
Bidding
Bidding
Reports
System

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

The screenshot shows the 'Add Auction' form with three columns: General, Advanced, and Bidding. The 'Name', 'Effective Date', 'From', and 'Through' fields in the General column are highlighted with red boxes.

* Required	Advanced	Bidding
General		
Name *	Bidder maximum	Bid Method *
A Shift Vacation	wins per auction	Queue
Effective Date	Bidder maximum	Bidder maximum
01/01/2017	wins per turn	bids per auction
From	Bidder minimum	Bidder minimum
mm/dd/yyyy	wins per turn	bids per auction
Through	Institution	Format
mm/dd/yyyy	<None>	
Conditions	External ID	<input type="checkbox"/> Auto order bids [1-x] (Preference auction)
		<input type="checkbox"/> Run rules only once per winner (Preference auction)
	<input type="checkbox"/> Blind auction (hide competing)	

3. Name the auction **"A Shift Vacation"**.
4. **Effective Date** creates the first vacation date available for bidding. 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 field so the auction can be reused for next year's vacation bid.*
5. **From**, **Through** and the **Conditions** fields determine when the actual bidding for the vacation days can occur. *Leave these blank for this exercise.*



Conditions

External ID

Bidders

Win Order

Blind auction (hide competing bids)

Show "Sold Out" items

Check Dynamic Issues on 'Save'

Allow bid retraction

Allow bidders to skip their personal turn

Auto order bids [1-x] (Preference auction)

Run rules only once per winner (Preference auction)

Consider unbid items too (Preference auction)

End Bidder's turn on 'Save' (Queue auction)

Auto award items on win

6. Add the previously created **BID Bidders Plan** to the **Bidders** field by clicking on the **paper icon**.

Candidates

Include Additional Properties (show all)

3 selected

List Plan

BID Bidders Plan

Properties

Target Date (DyD)

Start Date (DyD)

End Date (DyD)

TARGET

TARGET

TARGET

Cancel Save

7. The **Candidates** window appears. Select the list plan from the **List Plan** drop-down. **Save**.

* Required

Effective Date

01/01/2017

From

mm/dd/yyyy

Through

mm/dd/yyyy

Conditions

Bidders

BID Bidders Plan

Win Order

<None>

Bidder maximum

wins per turn

Bidder minimum

wins per turn

Institution

<None>

External ID

Blind auction (hide competing bids)

Show "Sold Out" items

Check Dynamic Issues on 'Save'

Allow bid retraction

Allow bidders to skip their personal turn

Bidder maximum

bids per auction

Bidder minimum

bids per auction

Format

Auto order bids [1-x] (Preference auction)

Run rules only once per winner (Preference auction)

Consider unbid items too (Preference auction)

End Bidder's turn on 'Save' (Queue auction)

Auto award items on win





- The **Bidders** field is now populated. *Note: The Win Order field is only used in a Preference Auction as it will be the list plan that determines winners of the preference auction.*
- 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.
- Save.**

Step 5 – Advanced Settings

The screenshot shows two side-by-side configuration panels. The left panel is titled 'Advanced' and contains fields for 'Bidder maximum' (wins per auction), 'Bidder maximum' (wins per turn), 'Bidder minimum' (wins per turn), 'Institution' (set to '<None>'), and 'External ID'. It also has several checkboxes: 'Blind auction (hide competing bids)', 'Show "Sold Out" items' (checked), 'Check Dynamic Issues on "Save"', 'Allow bid retraction', and 'Allow bidders to skip their personal turn' (checked). The right panel is titled 'Bidding' and contains a 'Bid Method *' dropdown menu set to 'Queue', 'Bidder maximum' (bids per auction), 'Bidder minimum' (bids per auction), and a 'Format' field. Below these are three unchecked checkboxes: 'Auto order bids [1-x] (Preference auction)', 'Run rules only once per winner (Preference auction)', and 'Consider unbid items too (Preference auction)'. At the bottom of the 'Bidding' panel, 'End Bidder's turn on "Save" (Queue auction)' is checked, and 'Auto award items on win' is unchecked. Red boxes highlight the 'Bid Method *' dropdown, the 'Show "Sold Out" items' checkbox, the 'Allow bidders to skip their personal turn' checkbox, and the 'End Bidder's turn on "Save" (Queue auction)' checkbox.

- Set the **Bid Method** to **Queue**. This type of auction forces users to bid one at a time, typically by seniority, and as users select an item they can expect to be awarded that item.
- Check **Show 'Sold Out' items**. This allows bidders to visually see which dates are already "sold out" and cannot be selected since the vacation limit for that day has been reached. These days show as "Sold Out".
- Check the **Allow bidders to skip their personal turn** checkbox. Since a queue auction forces users to bid one at a time in a specific order, this setting allows the auction to move on even if

A Shift 122 items

01/02/2017	! Sold Out
01/04/2017	
01/09/2017	! Sold Out
01/11/2017	! Sold Out
01/13/2017	! Sold Out
01/18/2017	



the next user is not ready to make their selections. This user would simply log into the auction and select **Skip Turn**.

4. **Auto award items on win** can be checked for a queue type auction however in this example **do not** check this box. *Selecting this box instantly awards once the Save button is clicked and places the vacation codes on the user's calendar.*

Step 6 - Creating the Vacation Dates

Edit Auction: A Shift Vacation

Buttons: Add, Delete, Edit, Select

Menu: Child, Sibling, Clone, **Generate items...**

* Required

General | Advanced

Name *
A Shift Vacation

Effective Date
01/01/2017

Bidder maximum
wins per auction

Bidder maximum
wins per turn

1. On the left side of the **Edit Auction** window, click the **Add** drop-down and select **Generate items...**

Generate Items

Generate Item Award Type *
Work Code

Include Additional Properties (show all)
2 selected

Generate Names

Properties

Work Code *
<None>

Shift *
<None>

From
###-01-01

Through
###-12-31

Target what days in cycle *
All days in cycle

Group Shift Pattern *
Shift Cycles

2. The **Generate Items** window appears. From the **Generate Item Award Type** drop-down, select **Work Code**. This causes the window selections to change.

Properties

Work Code *
Vacation

Shift *
A Shift

From
###-01-01



3. In the **Properties** section, select **Vacation** from the **Work Code** drop-down and **A Shift** from the **Shift** drop-down.
4. Ensure the **From** and **Through** Dynamic Dates are correct. *This is the range of dates that the auction will encompass.*

5. At the **Target what days in cycle** drop-down, select **Shift days only**. *This selection ensures the days presented to the bidder are only working days per his assigned shift.*
6. At the **Group Shift Pattern** drop-down, select **Calendar Days**. *This selection allows bidders to select individual days rather than forced to select a group of days.* **Save.**

7. All vacation days are created on the left.
8. Notice that days are titled by Day 1, Day 2, etc. To change to the date format, utilize the previously created **Formula ID**, by clicking on the **Day 1** checkbox.
9. From the **Select** drop-down, select **Select same level**. All days are now checked.
10. Click on the **Edit** button. All days are now highlighted.

11. To assign the formula ID to all days, select it at the **Name Formula ID** drop-down. Select **Save**.



Auction: **A Shift Vacation**

A Shift

- 01/01/2017
- 01/02/2017
- 01/03/2017
- 01/04/2017
- 01/05/2017
- 01/06/2017
- 01/07/2017
- 01/08/2017
- 01/09/2017
- 01/10/2017
- 01/11/2017
- 01/12/2017
- 01/13/2017
- 01/14/2017
- 01/15/2017

12. All days now have the correct date.

Step 7 – Review Settings for an Individual Day

1. Click on any date's **checkbox** and click on the **Edit** button. Review the date settings on the right side of the window.

Item General	Properties
Name *	Dynamic Auction Quantity
01/01/2017	<None>
Name Formula ID	Static Maximum
Vacation Date	3
Description	Award Type *
	Work Code
Description Formula ID	Qualifications
<None>	
Visible Conditions	Default bid value
Conditional	1
SHIFTWORKING	External ID
Biddable Conditions	
Is biddable	

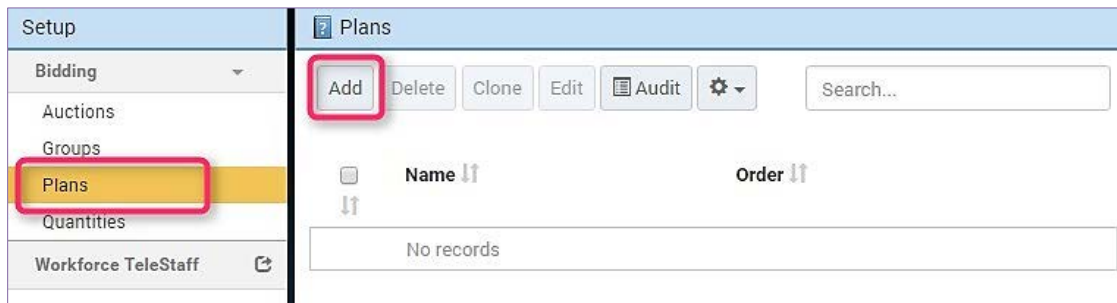




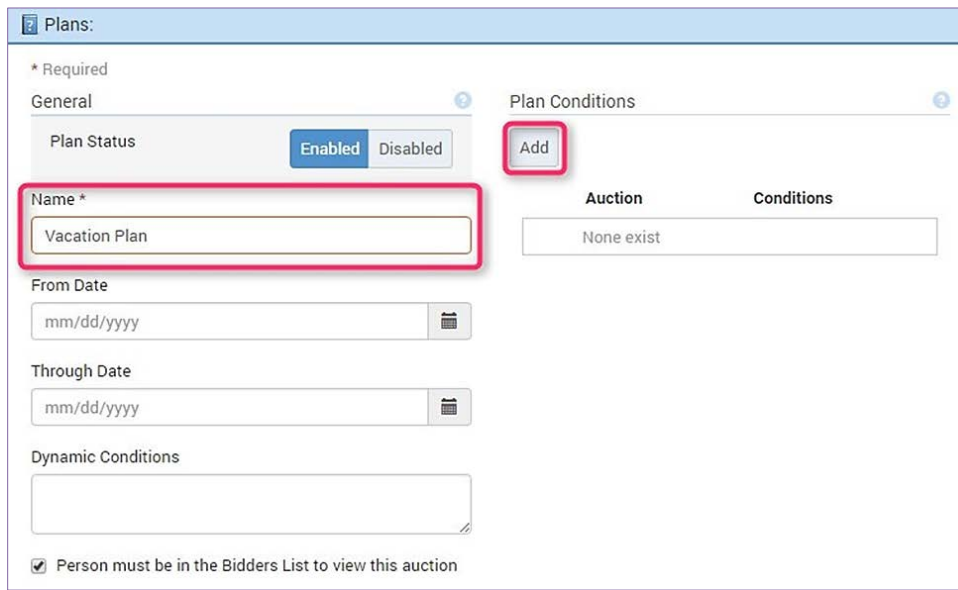
- **Visible Conditions** – Determines whether this auction item (and any children it may contain) are visible. This auction is set to **Conditional** with the Dynamic Argument **SHIFTWORKING** defining the condition of when it is visible. This ensures bidders only see days based on their permanently assigned shift.
- **Biddable Conditions** – Determines whether this auction item can accept bids. This auction is set to **Is biddable**.
- **Static Maximum** – Sets the total number of people that can bid this auction item. This auction is set to allow three people to be awarded this day as a vacation day.
- **Dynamic Auction Quantity** – Allows the auction to dynamically set different amounts of awarded bids based on attributes such as rank or specialty.

Step 8 – Make the Auction Available for Use

1. Move to bidding Plans by selecting **Setup** on the **Navigator** at the top. Bidding setup items appear in the **Setup** window.



2. Select **Plans**. The **Plans** window appears on the right. Select the **Add** button to create a new auction plan.





- In the new **Plans** window, add the name of the vacation plan.
 - The **From Date**, **Through Date** and **Dynamic Conditions** fields define when the auctions associated with this plan are visible to end users. *Leave these fields blank.*
 - The **Person must be in the Bidders List to view this auction** dynamically sets the auctions in this plan to only be viewable to those users included in the auction's bidders list.
- Click on the **Add** button to define the auctions that are part of this plan.

- From the **Auction** drop-down, select the **A Shift Vacation** auction. **Save.**

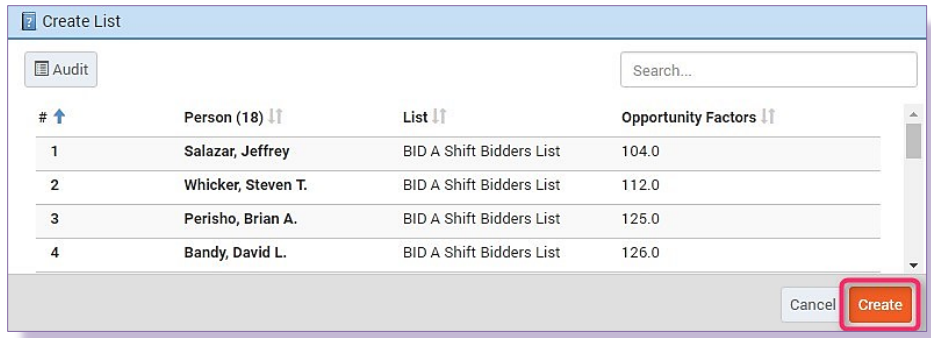
Step 9 – View Results and Manage Auction

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

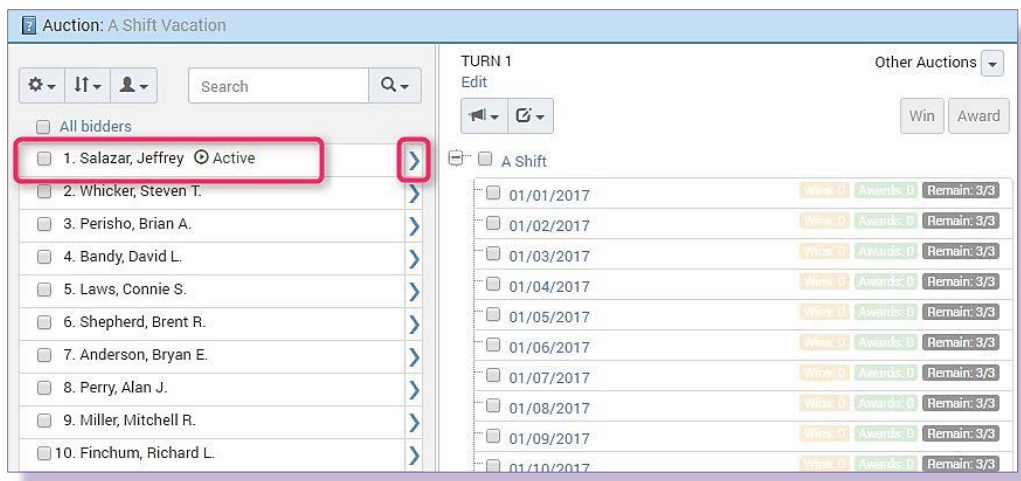
- Select **Manage** to manage the auction. *Selecting the auction itself provides access to the auction as a bidder only.*

Date	Win	Awards	Remain
01/01/2017	0	0	3/3
01/02/2017	0	0	3/3
01/03/2017	0	0	3/3
01/04/2017	0	0	3/3

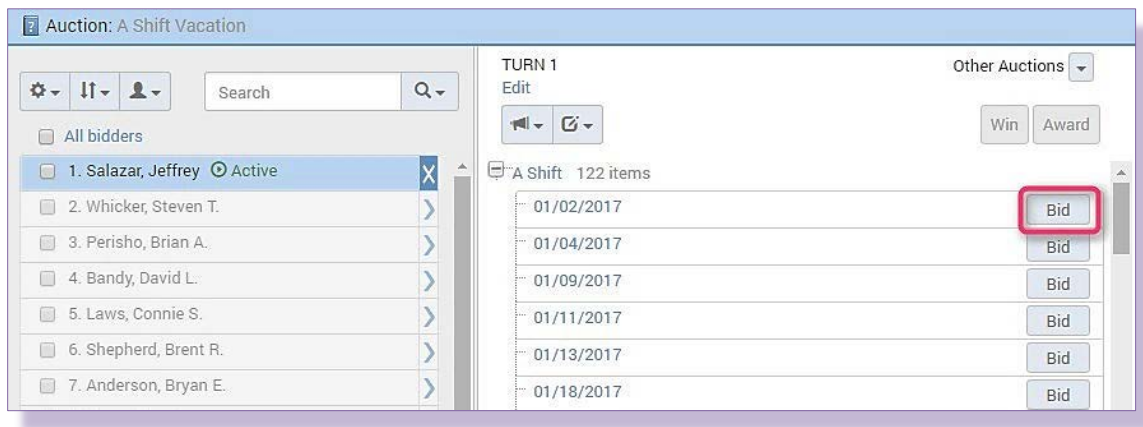
- The list of auction bidders is blank until the bidders list is created. Create the list by clicking on the **gear** icon on the left side and from the drop-down select **Create List...**



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



5. Once the bidders populate, note the window shows it is **Jeffrey Salazar's** turn denoted by the **Active** icon.
6. To bid for Jeffrey and/or view the auction as he would see it, click on the **blue arrow** to the right.



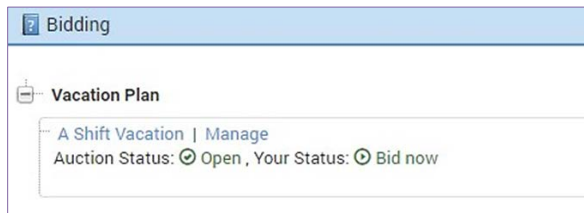


- The auction now shows only dates associated with Jeffrey's permanently assigned shift and is ready for him to bid on days by selecting the **Bid** button. *Bidding can start immediately since there was not a **From, Through** or **Condition** defined in steps 4 or 7.*

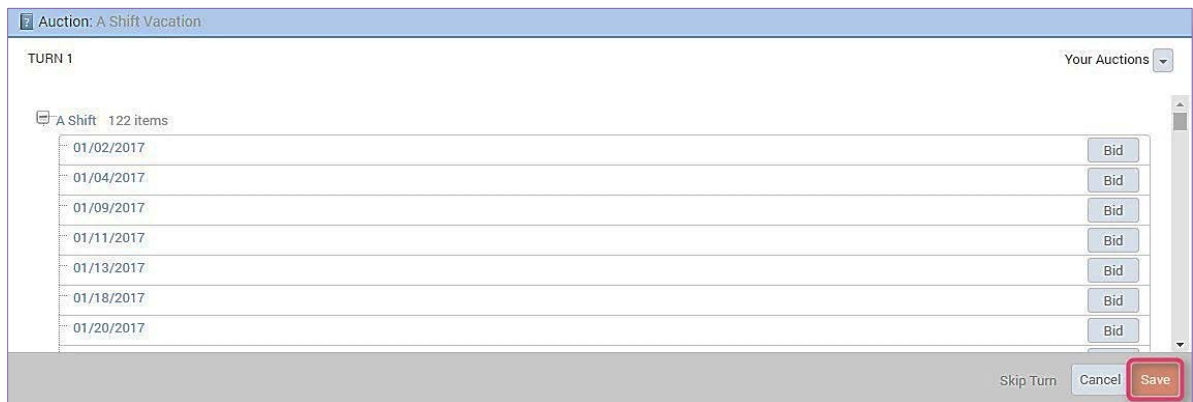
Step 10 – Test the Auction, Begin to Bid

It's always good to test an auction to verify it is functioning as expected.

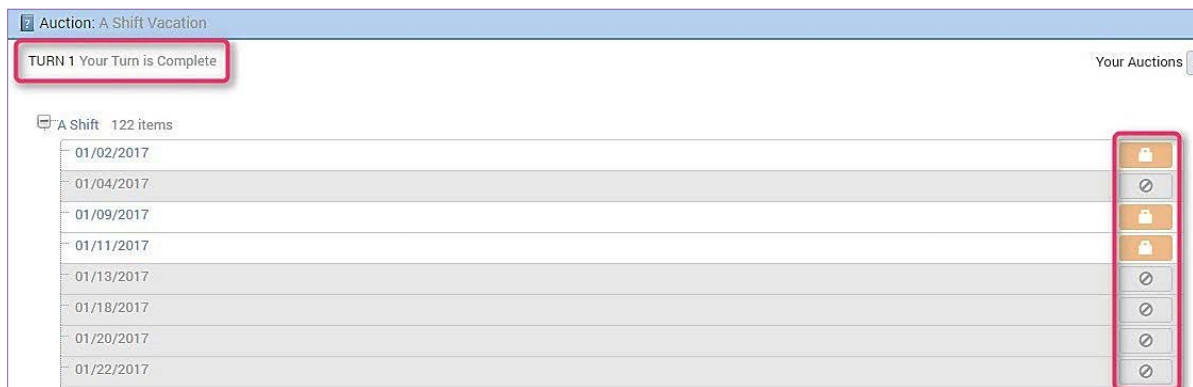
- Log in as the top bidder, **Jeffrey Salazar** and from the **Navigator** at the top, select **Bidding**.



- Notice the **Vacation Plan** is visible and provides **Jeffrey Salazar** the eligible status to **Bid now**. Select the **A Shift Vacation** to start bidding. *Note: Jeffrey Salazar has the Manage selection as well because he's a TeleStaff Administrator.*

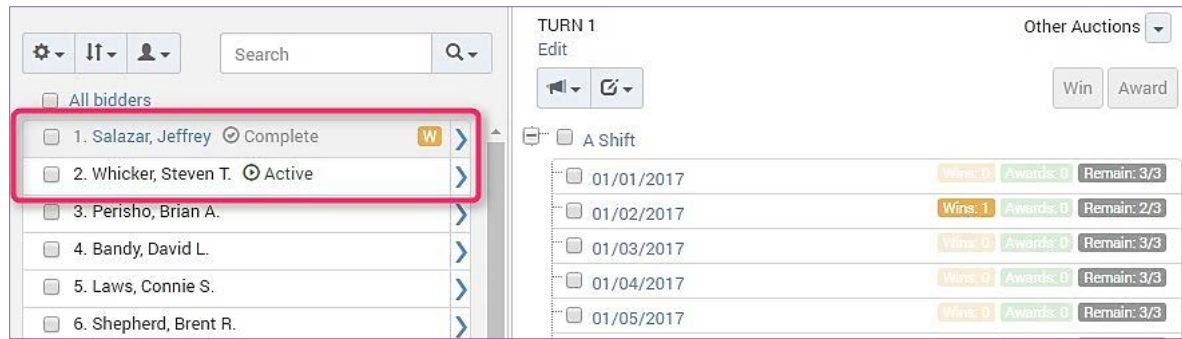


- Bid** on some desired dates and click **Save** at bottom right.





- Upon clicking the **Save** button, Jeffrey's turn is complete as noted by the notation top left, his selected days are **orange** and have a **lock icon** and all other days are unavailable.
- Log back in as the **Administrator** and from the **Navigator** at the top, select **Bidding** and at the **Vacation Plans A Shift Vacation**, select **Manage**.



- Notice **Jeffrey Salazar** is marked as **Complete** and **Steven Whicker**, second on the list, is now the **Active** bidder.

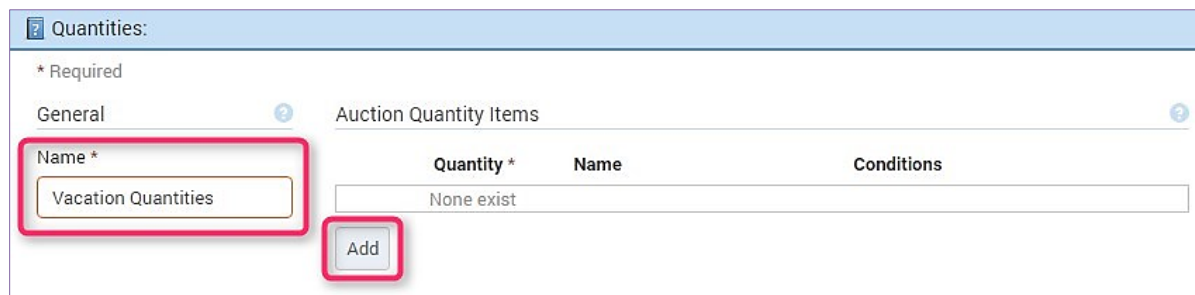
Exercise 2 – Change the Auction to Control Per Day Rank Limitations.

Objective – Continuing with the previous exercise, the auction already allows a maximum of three users off per day, but some departments instill controls on how many of each rank are allowed off.

In this exercise, allow a maximum of 3 users off per day but utilize auction Quantities to set limitations on ranks. Allow a maximum of 1 Captain off per day, 2 Engineers and/or 3 Firefighters.

Step 1 – Create Quantities for the Auction

- Logging in as the **Administrator** and moving back to **Setup->Bidding->Bidding**, select **Quantities**.
- Select **Add** to create a quantity.



- The **Quantities** window appears. Enter a name in the **Name** field, **Vacation Quantities**.
- Select **Add** to define a rank quantity.



Auction Quantity Items

Quantity *	Name	Conditions
1	Captains	PERSONHASJOBTITLE(10)

Add

- In the **Name** field, enter **Captains**, set the **Quantity** of captains to **1**.
- In the **Conditions** field use the Dynamic Argument, **PERSONHASJOBTITLE()**. Enter the gray number of the Captain rank in the parenthesis.
- Add additional quantities for Engineers and Firefighters:
 - Engineers**
 - Quantity = 2
 - Conditions field: PERSONHASJOBTITLE()
 - Firefighters**
 - Quantity = 3
 - Conditions field: PERSONHASJOBTITLE()

General Auction Quantity Items

Name *	Quantity *	Name	Conditions
Vacation Quantities	1	Captains	PERSONHASJOBTITLE(10)
	2	Engineers	PERSONHASJOBTITLE(9)
	3	Firefighters	PERSONHASJOBTITLE(8)

Note: In some instances, the order of the quantity items can be very important. When the bidding module looks at Auction Quantity, it compares a user to the Quantities starting at the top and stops at the first quantity that meets the users' attributes. For example, if the scenario is 2 firefighters with the paramedic specialty are allowed off per day but 3 firefighters without the specialty can take the day off, the order of the quantities must set the firefighter paramedic above firefighters. If firefighter is above the firefighter paramedic, firefighter paramedics qualify under firefighter quantity, as they have the requirement of firefighter. The firefighter paramedic quantity must be



ordered above firefighter so that a firefighter paramedic stops at the first quantity but firefighters do not and move to the next quantity.

8. When finished, click **Save**. Note: When Auction Quantities are utilized, all ranks eligible to bid must be included in the quantity. Any ranks not called out in the Auction Quantity will not be able to submit bids. For example, in our exercise, although the Battalion Chief rank was included in the Bidder Ranks rule, they will not be able to bid because they were not included in the quantity.

Step 2 – Assign Quantity to the Auction

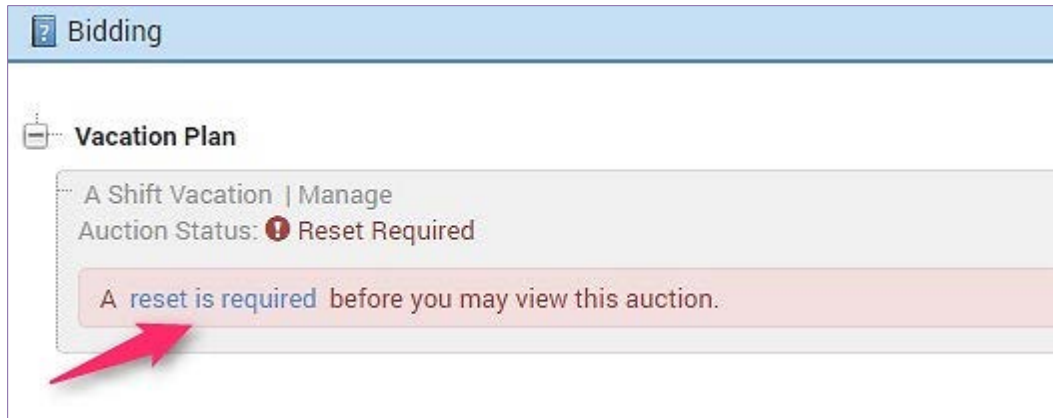
1. Move to the **A Shift Vacation** auction by clicking **Setup** located in **Navigation** at the top->**Bidding**->**Bidding**. From the **Auctions** folder select the **A Shift Vacation** auction.
2. To assign the **Auction Quantity** to all days at once, on the left side of the **Edit Auction** window, click the **checkbox** for the first date.
3. From the **Select** drop-down, select **Select same level**. All days are now checked.
4. Click on the **Edit** button. All days are now highlighted.

The screenshot shows the 'Edit Auction' interface for 'A Shift Vacation'. On the left, a list of dates from 01/01/2017 to 01/10/2017 is shown, with checkboxes for each date. The right pane is divided into 'Item General' and 'Properties'. The 'Properties' section has a red box around the 'Dynamic Auction Quantity' dropdown, which is currently set to '<None>' but has 'Vacation Quantities' selected. Other fields include 'Name *', 'Name Formula ID' (set to 'Vacation Date'), 'Description', and 'Award Type *' (set to 'Work Code'). The 'Static Maximum' is set to 3. The top right of the window indicates 'Multiple records being edited: 00 Blank values'.

5. From the **Dynamic Auction Quantity** drop-down, select **Vacation Quantities**. **Save**.
6. Note that the **Static Maximum** remains at a total of **3** people off per day.

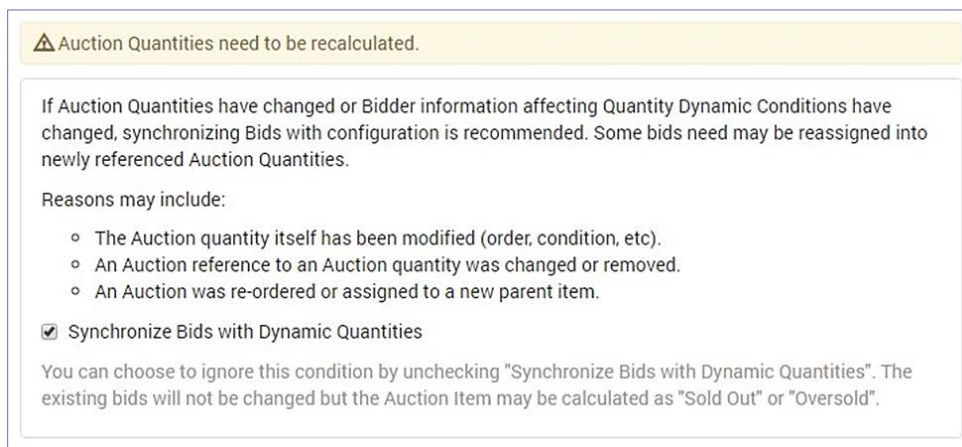
Step 3 – View Results

When a change is made to an existing auction with bid selections already entered, the auction will require a reset in order to apply those changes.

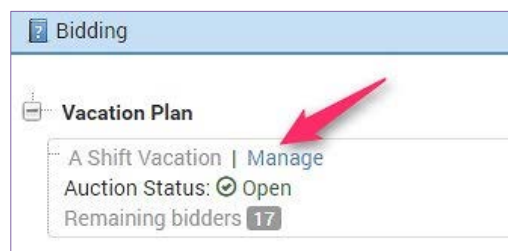


A reset is required for the A Shift Vacation auction. When the bidding originally started, there were no limitations on how many of each rank could receive vacation on any one day. Now the auction must limit the numbers of ranks per day and must calculate how many of each rank have already received vacation days.

1. Select **Bidding** from the **Navigator** at the top to move to the **A Shift Vacation** auction. The reset warning appears.
2. Click on the **reset is required** link.



3. A second warning appears. Keep the **Synchronize Bids with Dynamic Quantities** checked. Clicking **Save** to return to the **Bidding** window.
4. Click on the **Manage** link.
5. On the right side of the auction, select **Reset auction...** from the **Auction** drop-down.





6. The **Reset Auction** window appears.

7. Check the **Clear bid records/status** checkbox and the radio button **Remove bids, wins and awards – Keep nothing**. *This selection removes all bidding that has occurred in this auction. The process of resetting an auction is used by customers to clean out the previous year's auction in preparation for the next year.*

Note the other option of Synchronize Bids with Dynamic Quantities. If this option is selected, bids that have already occurred will not be removed, the system will recalculate all bids matching to the assigned Auction Quantities.

8. **Save.**

9. The Auction is cleared out and ready for use.

10. Click on **Jeffrey Salazar's** blue arrow to view his auction selections.





<input type="checkbox"/> 1. Salazar, Jeffrey Active	<input type="checkbox"/> A Shift - 122 items No Quantity
<input type="checkbox"/> 2. Whicker, Steven T.	01/02/2017 Not Qualified
<input type="checkbox"/> 3. Perisho, Brian A.	01/04/2017 Not Qualified
<input type="checkbox"/> 4. Bandy, David L.	01/09/2017 Not Qualified
<input type="checkbox"/> 5. Laws, Connie S.	01/11/2017 Not Qualified
<input type="checkbox"/> 6. Shepherd, Brent R.	01/13/2017 Not Qualified
<input type="checkbox"/> 7. Anderson, Bryan E.	01/10/2017 Not Qualified

- Notice he is not qualified to bid on any items. This is because Battalion Chiefs were not included in the **Auction Quantities**. Either go back and add Battalion Chiefs to the **Vacation Quantities** or when testing, mark him as **Skip Bidder's Turn** (this will be covered in the next exercise).

Exercise 3 – Establish Multiple Turns in the Vacation Auction

Objective – Continuing with the previous exercise, to establish a fairer auction, let's now define that a staff member may only bid for 2 vacation days at a time. Once all other bidders are finished with their bids, another turn starts. Multiple turns prevent senior staff from selecting all the prime vacation days. Bidders will need to prioritize preferences, selecting their top two items in the first turn. Each bidder is allowed 10 vacation days per year. Bidders select 2 days per turn, totaling 5 rounds.

Step 1 – Change the Auction to Establish Turns

- Moving back to **Setup->Bidding->Bidding**, select **Auctions**. Select the **A Shift Vacation** auction.
- In the **Advanced** section, enter **10** in the **Bidder maximum wins per auction** field. The auction is now set to allow for a maximum of 10 wins per user.
- Enter **2** in the **Bidder maximum wins per turn** field. This limits the amount a user can win in any one turn to a maximum of 2.
- Save**.

Advanced

Bidder maximum
10 wins per auction

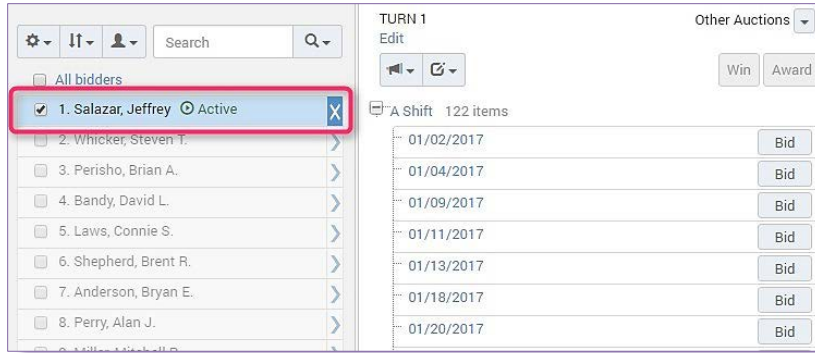
Bidder maximum
2 wins per turn

Bidder minimum
wins per turn

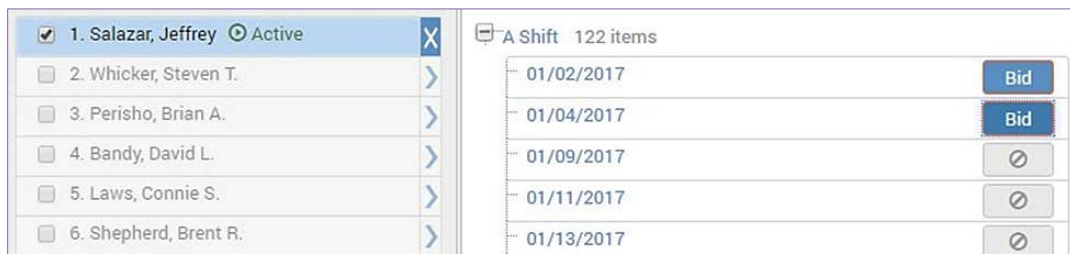
Step 2 – View Results

Again, if testing has been done in the auction and currently contains bids, this change will result in the **Reset Required** warning. Instructions on resetting the auction are found in Exercise 2, Step 3.

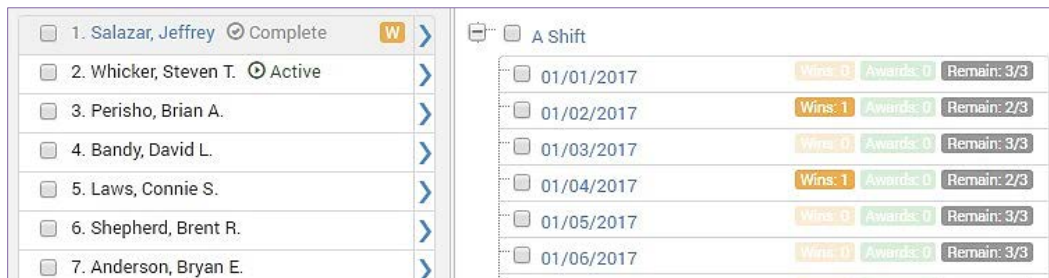
- Move to the auction by clicking **Bidding** in the **Navigator** at the top.
- From the **Vacation Plan's A Shift Vacation**, select **Manage** to manage the auction. *Reset the auction, if necessary.*



3. Click on the **blue arrow** of the first bidder marked as **Active**. *Note: In this example, Jeffrey Salazar is now able to bid. This is because Battalion Chiefs were added to the Auction Quantities as 1 Battalion Chief allowed off per day.*

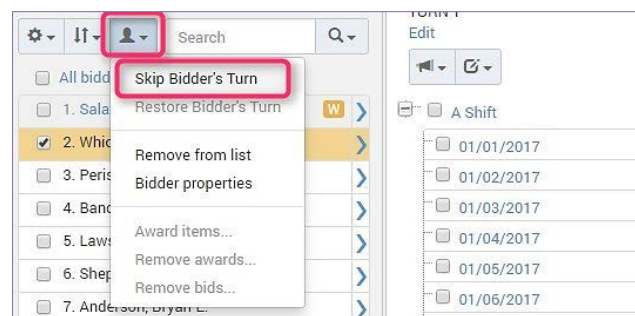


4. Begin **bidding** on dates and ensure each user is only allowed **2 bids** per turn.



5. Once the bidder has reached the maximum allowed, **save** the bids and move on to the next active bidder.

6. **Check** the checkbox for the next active bidder and from the **head icon** drop-down, select **Skip Bidder's Turn**. This bidder's turn has been skipped and the next bidder becomes active.



7. Continue bidding for each user by either selecting dates or skipping turns until the





list is exhausted and another round is ready to begin. *Note: The assigned auction quantities also come into play.*

The screenshot shows a software interface with a list of bidders on the left and an auction control panel on the right. The bidder list includes names and their status, with a red arrow pointing to the 'Complete' status of the first bidder. The auction control panel has a dropdown menu for 'Auction' with 'Start new turn' highlighted in a red box. Below the dropdown is a calendar view showing dates from 01/08/2017 to 01/19/2017, with some dates marked as 'Sold Out'.

- When all bidders are marked **Complete**, select **Start new turn** from the **Auction** drop-down to start the next turn.

The screenshot shows a 'Confirm' dialog box with a warning message: 'Use caution when modifying auction turns.' Below the message is the question: 'Are you sure you would like to modify the auction turn?' At the bottom right are 'Cancel' and 'OK' buttons.

- A confirmation window appears, select **OK**.

The screenshot shows the software interface after the confirmation. The bidder list on the left now shows the first bidder as 'Active', highlighted with a red box. The auction control panel on the right shows 'TURN 2' highlighted in a red box. The calendar view shows dates from 01/01/2017 to 01/05/2017, with some dates marked as 'Sold Out' and others showing 'Wins: 3', 'Awards: 0', and 'Remain: 3/3'.



10. The auction now has now moved on to **Turn 2**. The first bidder is **Active** again and bidding is ready to begin.

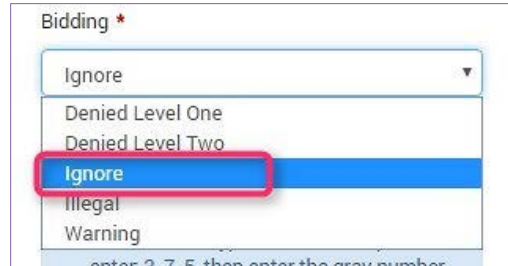
Exercise 4 – Establish the Auction to Award Based on Accrual Balances

Objective –If the system is configured with accruals, an auction can award items based on a user’s accrual balance.

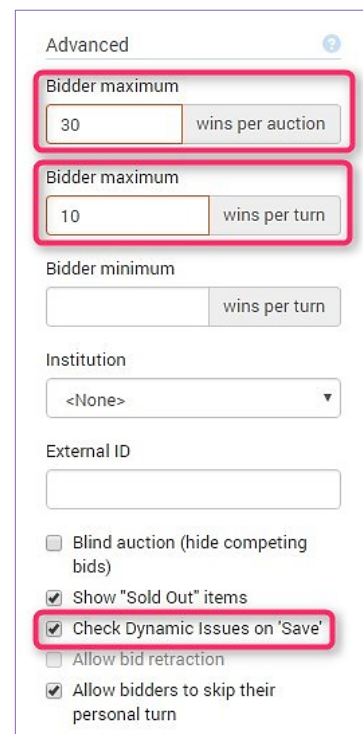
Continuing with the previous exercise, let’s now change the auction to look at a user’s vacation balance and award auction items based on what the user has available. Also, regardless of the users’ accrual balance, they may not take more than 30 vacation days in any one year. Configure the auction to check Dynamic and Static Issues upon the saving of a bid.

Step 1 – Change the Auction to check Dynamic and Static Issues for Limitations

1. Moving back to **Setup->Bidding->Bidding**, select **Auctions**. Select the **A Shift Vacation** auction.
2. To set the auction to limit awarding vacation days based on a user’s accrued balance, move to the **Advanced** section.
3. **Check** the checkbox **Check Dynamic Issues on ‘Save’**. The auction now checks the static issue associated with accruals to ensure users have sufficient accrued hours to win the selection.



Note: When setting this feature be sure and review any existing Dynamic Issues. Set the Bidding drop-down to ignore issues not pertinent to the auction.



4. At **Bidder maximum wins per auction**, enter **30**. The auction is now set to allow a maximum of 30 wins per user.
5. At **Bidder maximum wins per turn**, enter **10**. This breaks up the amount a user can win in any one turn to a maximum of 10.

Step 2 – Setting Up Accruals

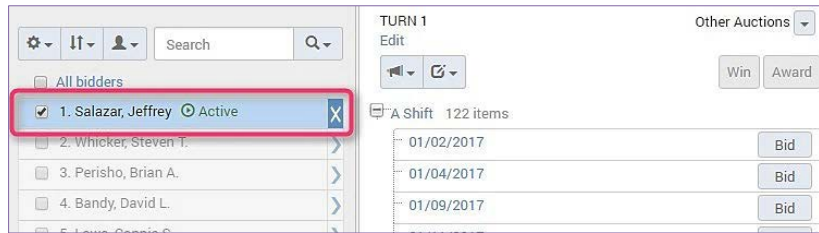
This exercise assumes the system is configured with an accrual bank for vacation and users have hours added to their vacation banks.



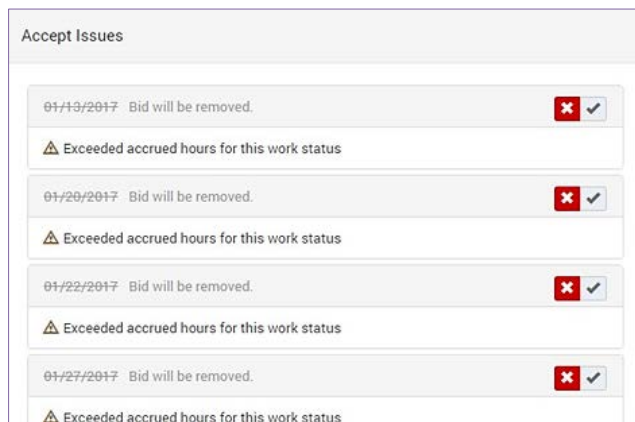
1. For this exercise, ensure the first bidder on the list, **Jeffrey Salazer** has **3 days** of accrued hours available in his bank (**72 hours**).
2. Add **12 days** worth of accrued hours (**288 hours**) in the next bidders bank.

Step 3 – View Results

1. Move to the **A Shift Vacation** auction by clicking **Bidding** in the **Navigator** at the top.
2. From the **Vacation Plan**, select **Manage** to manage the auction. *Reset the auction, if necessary.*



3. Click on the blue arrow of the first bidder, **Jeffrey Salazer**.
4. Begin **bidding** on Jeffrey's 10 vacation days. **Save**.
5. The **Accept Issues** window appears requesting confirmation to override the **Exceeded accrued hours for this work status** for each day beyond the accrual balance.



6. Click the **X** box for each of the dates to prevent the override for items not accrued. Notice the date becomes crossed out and has the notation, **Bid will be removed**. Click **OK** to return to the **Turn 1** window.



01/02/2017	Bid
01/04/2017	Bid
01/09/2017	Bid
01/11/2017	Bid
01/13/2017	Bid
01/18/2017	Bid

- All dates are removed except for the first three. **Save.** *Note: The user can unselect the remaining bids and select his top three choices instead.*

- Jeffrey Salazar** is marked as **Complete** and **Steven Whicker**, second on the list, is now the **Active** bidder.
- Log in** as the second bidder.

Contact Log										
		Type	For	Contact	Status	Description	Date	On	Shift	
	Accept	Message	Whicker, Steven T.	<online>	Auto. Message	You are now an active bidder in auction: A Shift Vacation.	12/22/2016	12/22/2016 16:31		

- The **Contact Log** appears letting the user know he is now the active bidder.
- Move to the auction by clicking **Bidding** in the **Navigator** at the top.
- Begin bidding on the user’s 10 vacation days. **Save.**



TURN 1 Your Turn is Complete

A Shift 122 items

01/02/2017	Sold Out	
01/04/2017		
01/09/2017	Sold Out	
01/11/2017	Sold Out	
01/13/2017	Sold Out	
01/18/2017	Sold Out	
01/20/2017	Sold Out	
01/22/2017	Sold Out	
01/27/2017	Sold Out	
01/29/2017		
01/31/2017	Sold Out	
02/05/2017	Sold Out	
02/07/2017		

13. The auction now displays all the user's selections and the notation at the top, **Your Turn is Complete**.