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Workforce Management Web for Supervisors Help

Agent Statuses in the Bidding Process

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Agent Statuses in the Bidding Process

The **Status** pane in the **Time-Off Bidding** view lists agents that have submitted requests within the bidding period and sorts them in the order that they will be processed for bid assignment. You can use the **Status** pane to manually change an agent's status when managing agent time-off requests within bidding periods.

Information about agent statuses is displayed in the following columns:

- **Actions** —Clicking this icon opens the agent's **time-off details** in a separate window.
- **Order**—Indicates the agent's place in the bid assignment processing queue.
- **Agents**—The agent's first and last name.
- **Status**—The agent's status; **Entering**, **Skipped**, **Ready**, **Waiting**, **Processed**, or **Timed Out**.
- **Modified**—The date and time that the agent's current status was changed.
- **Waiting End Date**—The date that waiting period ends for this agent's request changes, and when the bid assignment moves on to the next agent in the queue.
- **Site**—The agent's site name.
- **Team**—The agent's team name.

How Statuses Affect Request Processing

The agent's status determines when and how their time-off requests are processed for bid assignment. For example, these statuses can be selected in the Status drop-down list:

- **Entering**—The initial (default) status assigned to the agent, indicating that the agent can enter time-off requests to be added to the bidding period queue. Agents and supervisors can set this status any time agents want to change their requests. During bid processing, WFM sets the bid assignment status to **Waiting** and sends the agent an email notification.
- **Ready**—Usually set by agent, indicating that time-off requests were submitted and are ready for processing. Agents and supervisors can set this status at any time. WFM processes the requests and sets the request status either **Processed** or **Waiting**, depending on the bid assignment rules or constraints.
- **Skipped**—Supervisors can manually set this status at any time, indicating that bid assignment process should not consider the agent's requests. WFM ignores the agent's requests during the bid assignment process.

The following statuses are set by the bid assignment process; neither supervisors nor agents can set them:

- **Waiting**—Set when the bid assignment process cannot grant all requests. It indicates that the process is waiting for the agent to enter or change his/her time-off requests. Once the waiting period is over

(the date is displayed in the **Waiting End Date** column) or the process finds that all changed requests can be granted, it resumes processing.

- **Processed**—Set when all of the agent's requests have been successfully granted, or the agent has not submitted any requests. The process also checks for items that might have already been granted.
- **Timed Out**—Set when the time allotted to the agent to edit or enter time-off requests has expired. At this point, the process moves on to the next agent.

Tip

Bidding periods created before migration to the latest 8.5.2 release, will have no saved agent status records, Therefore, agents statuses will default to **Entering**, but you can change them after migration to conform to the new rules. If you make no changes to the bidding period properties after migration, the *old* bidding period functions.

Changing an Agent's Status

To change an agent's status:

1. Click the **Status** tab.
2. In the **Status** column (of the agent whose status you want to change), click the drop-down list to select **Entering**, **Ready**, **Processed**, or **Skipped**.
3. Click **Save** .

The **Modified** column displays the date and time of the change.

Viewing Time-Off Details for an Agent

1. Click the **Status** tab
2. Find the agent whose details you want to view and in the first column, click **Actions** . **The agent's time-off details open in a separate window.**
3. Optionally, click **Sort**  and select **Date**, **Item**, **Start Time**, **End Time**, **Paid Hours**, **Status Requested**, **Status Actual**.

What's in the Details?

The **Time-Off Details** window includes:

- The agent's name
- The period or date range within which time-off requests were made (matches the Start and End dates that you entered in **Bidding Period Properties**)
- A table containing detailed information in the following columns: **Date, Item, Start Time, End Time, Paid Hours, Status Requested, Status Actual**
- A **Sort**  icon, enabling you to sort by date, item, start time, end time, paid hours, status requested, or status actual.