Workforce Management Web for Supervisors Help

Managing Overtime Offers

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Managing Overtime Offers

At any given time, you might have more than one Overtime Offer open or in progress. WFM makes it easy for you to manage Overtime Offers by providing intuitive controls and views, enabling you to perform the following tasks:

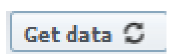
- Create, edit, delete, or copy offers.
- Associate agents and sites with offers.
- Disassociate or remove agents and sites from offers.
- View bid slots for selected agents and decline bid requests.
- Initiate the overtime scheduling process.
- Edit the **Properties**, **Agents**, and **Sites** settings for a selected offer by clicking the tab, making the necessary changes and then, saving them.

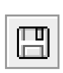
Creating Overtime Offers

Create Overtime Offers that are less than 6 weeks only. WFM displays a validation error if an offer exceeds 6 weeks and does not saved it.

Link to video

To create an overtime offer:

1. Go to **Schedule** > **Overtime Bidding**.
2. In the **Objects** pane, select a business unit or a site and then, click 

.
3. In the **Overtime Offers** pane, click **New**  .
The Overtime Offer Properties pane opens.
4. Enter a name for the Overtime Offer.
By default, the Name field is already populated with a unique name when you select New. The name includes a number to ensure that each newly created Overtime Offer has a unique name in the Configuration database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.
5. Continue setting the properties as described in Overtime Offer Properties.
6. When finished, click **Save**  .

> **Tip**
>
> If the list of Overtime Offers becomes long, find offers quickly by entering criteria into the **Search** field, or by using clicking **Sort** and selecting one of three columns to sort on: **Name**, **Start**, **End**. Alternatively, sort any of these columns in ascending or descending order, by clicking the column header.

After you save the Overtime Offer, WFM displays the **Agents** tab, enabling you to associate agents with this offer. Also, use the **Sites** tab to associate sites with this offer.

Editing Offers

To edit an overtime offer:

1. In the **Overtime Offers** pane, select the offer you want to edit.
2. In the **Overtime Offer Properties** pane, make the necessary changes.
3. Click **Save**.

Deleting Offers

To delete an overtime offer:

1. In the **Overtime Offers** pane, select the offer you want to delete.
2. Click **Delete**.
3. When the **Confirmation** dialog opens, click **Yes** to delete the offer, or **No** to cancel the action.

Using Copy to Create Offers

To create an overtime offer by copying an existing offer:

1. In the **Overtime Offers** pane, select the offer you want to copy.
   The Associate
2. Select the Business Unit that you want to associate with this offer and click **Apply**.
3. Rename the offer and change any other property settings, as required.
   The Overtime Offer name must be unique.
4. Click **Save**.

Associating Agents with Offers

You can associate agents in two ways: By selecting all agents skilled in the activity you specified for this Overtime Offer or by choosing agents from a list. Note that the controls used to add and remove agents from a list are not visible when you select the option **Use all agents skilled for the selected activity**.

To associate agents with an overtime offer:

1. Click the **Agents** tab.
2. Check the **Use all agents skilled for the selected activity** check box.
   The Agents section of the pane is populated only with agents who are skilled in the specified activity. WFM selects these agents automatically.
3. Optionally, click **Add Agents**  to select agents from a list.
   The Available Agents pane opens these columns
   (the agents') **Last name**, **First name**, **Site**, and **Team**.
4. Select the agents you want to associate with the Overtime Offer and click **Assign and save** .

This procedure is also demonstrated in the video Creating Overtime Offers above.

Using Search and Sort to Find Agents

If the list of agents on the **Agents** tab or in the **Available Agents** pane becomes long, find agents quickly by clicking **Sort** :

- Select one of three columns to sort on the **Agents** tab: **First name**, **Last name**, **Site**.
- Select one of four columns to sort in the **Available Agents** pane: **First name**, **Last name**, **Site**, **Team**.

You can also use **Search** to find agents in long lists by clicking the **First name** or **Last name** radio buttons and then, entering the agent's name, or enter other search criteria

Removing Associated Agents from Offers

To remove agents associated with an overtime offer:

1. In the **Agents** tab, click the row of the agent that you want to remove.
2. Click **Remove agents** .
3. When the **Confirmation** dialog opens, click **Yes** to delete the agent, or **No** to cancel the action.

Viewing Bid Slots for Agents

To view bid slot for an agent:

1. In the **Agents** tab, click the row of the agent whose bid slots you want to see.
   The Bid Slots pane opens, showing bid information for the selected agent in four columns
   - **Bid** (priority)
   - **Start** (date/time)
   - **End** (date/time)
   - **Status** (of the bid)

Declining Agents' Bid Requests

To decline an agent's bid request:

1. Click the **Agents** tab and select the agent whose bids you want to view and decline.
   The Bid Slots pane opens displaying a list of the agent's bid requests.
2. Select the row containing the bid you want to decline.
   The Bid Slot Details pane opens with the following information:
   - **The schedule date (on which agents insert bid slots)**
   - **The bid slot start date and time**
   - **The bid slot end date and time**
   - **The priority number**
   - **The status**
   - **The reason (or warnings that appear when agents insert bid slots or during processing)**
   - **The comments associated with the bid slot**
3. Click **Decline** .
4. In the **Confirmation** dialog that opens, click Yes to proceed or No to cancel the action.
   If you select Yes, the status in the Bid Slots pane changes to Declined.
5. To continue with another bid slot or another agent, click **Close**  to return to the **Agents** tab.

Associating Sites with Offers

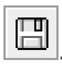
To associate sites with an overtime offer:

1. Click the **Sites** tab.
2. Check the sites that you want to associate with the offer.
   If you want to select all sites, select the top check box named Site.

This procedure is also demonstrated in the video Creating Overtime Offers above.

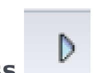
Removing Associated Sites from Offers

To remove sites associated with an overtime offer:

1. In the **Sites** tab, clear the check box beside the site(s) you want to remove or disassociate from the offer.
2. Click **Save** .

Initiating the Overtime Scheduling Process

To start the overtime scheduling process:

1. At the top of the **Overtime Offers** pane, click **Initiate scheduling process** .
2. When the **Confirmation** dialog opens, click **Yes** to begin the scheduling process or **No** to cancel the action.
   If you select Yes, a Processing dialog opens with a progress bar indicating that WFM is processing the agents' requests.

After WFM processes all agents' requests for overtime and schedules them, the Overtime offer is closed and WFM clears the check box **This Overtime Offer is open**. Agents who submitted requests will see them as **Resolved** in the Web for Agents UI and the Overtime offer status as **Closed**.

Continuous Processing of Overtime Offers

You can enable WFM to continuously process Overtime Offers, which have FIFO selected for agent bid ranking criteria. Continuous, automatic processing is enabled by setting a configuration option in the WFM Server application, which specifies the time interval between overtime bidding processes. When enabled, there's no need to manually initiate the scheduling process, as Overtime Offers stay open and WFM does not automatically clear the **This Overtime Offer is open** check box to close the offer (as it does when the process is manually initiated).

For information about how to enable this feature, see the *Workforce Management Administrators Guide*.