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Workforce Management Web for Supervisors Help

Overtime Bidding

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Overtime Bidding

Rather than simply assigning overtime hours to agents, you can create Overtime Offers and enable agents to select the overtime hours they most prefer. After you customize and open the offer for bidding, agents can view it in the Web for Agent's interface and enter bids for their desired overtime slots. WFM then processes the bids, using the hierarchy system of seniority or rank that you have chosen.

Important

To configure objects and change settings in the **Overtime Bidding** view, you must have the appropriate role privileges. See [Schedule Role Privileges](#).

How Overtime Bidding Works

Complete these steps to set up WFM Overtime Offers and initiate the bidding process. Click the links in the summary steps below, to read details.

1. **Obtain user role privileges**—Ensure that an administrator (or someone with administration privileges) has given you the proper role privilege, enabling you to access Overtime Bidding. See [Assigning Roles to Users](#) and [Schedule Role Privileges](#).
2. **Create an overtime offer**—[Create the offer](#) and sets its properties.
3. **Open the overtime offer for bidding**—[Open the offer](#), making it visible in the WFM Web for Agents interface. You can edit the Overtime Offer at any time.
4. **Wait for agents to submit bids**—Wait for agents who are associated with (can see) the Overtime Offer to submit their requests for overtime slots, including the desired start and end time for each slot. Agents can enter multiple bids within the same Overtime Offer, setting the preferred priority for each slot. Agent can enter overlapping time intervals or slots.
5. **Initiate the overtime scheduling process**—Start the overtime scheduling process; at the top of the **Overtime Offers** pane, click [Initiate scheduling process](#).

WFM Processes Bids for Overtime Scheduling

WFM begins the overtime scheduling process, using the associated agents list to select agents one-by-one, based on ranking order, and processing their overtime requests, based on the priority specified by the agent.

WFM schedules the slot if:

- The requested overtime is under the overtime requirement for activities associated with the Overtime Offer.

- Rules and constraints configured within Overtime Offer are satisfied
- Agents receive valid schedules based on existing constraints, meaning they do not generate schedule warnings.

After WFM finishes the overtime scheduling process, agents' schedule are committed to the Master Schedule.

Overtime Offer Properties

You'll find the following settings and controls in the **Overtime Offers Properties** pane:



- **Name**—Enter a name for the overtime offer. The name must be unique in the Configuration database.
- **Start Date and Time**—Enter the start date and time for the overtime offer. This is the earliest date/time for which agents can submit bids for overtime.
- **End Date and Time**—Enter the end date and time for the overtime offer. This is the latest date/time for which agents can submit bids for overtime.

Tip

Create Overtime Offers that are less than 6 weeks. WFM does not process or save offers that exceed 6 weeks.

- **Criteria**—Select the criteria that WFM will use to prioritize the processing of agents' bids. For example:
 - Rank
 - Seniority
 - Seniority and Rank
 - First come, first serve
- **This Overtime Offer is open** *check box*—Check this box to open the overtime offer and make it visible to agents. You can save the offer without checking this box and check it later when you are ready to open the offer.

ASSIGNS section:

- **Activity/Multi-Site Activity**—Use the radio buttons to select an activity or multi-site activity that agents will work on during the hours of the overtime offer. Click **Edit**  to open a list of activities or multi-site activities, select one, and click **Apply** . Click the **x** on an existing activity/multi-site activity to clear this field.
- **Marked Time** *drop-down list*—Select the Marked Time that will identify the assigned overtime activity/multi-site activity in schedules.

RULES AND CONSTRAINTS section—Enter values in the format hh:mm in this section:

- **Minimum slot size**—The minimum slot size of any one agent bid.
- **Maximum slot size**—The maximum slot size of any one agent bid.
- **Maximum agent overtime per day**—The maximum amount of overtime per day that a single agent can work.
- **Maximum total overtime per day**—The maximum total amount of overtime per day that all agents can work.
- **Maximum total agent overtime**—The maximum amount of overtime that a single agent can work.
- **Maximum total overtime**—The maximum total amount of overtime that all agents can work.

COMMENTS section—Enter any relevant comments or details about the Overtime Offer.