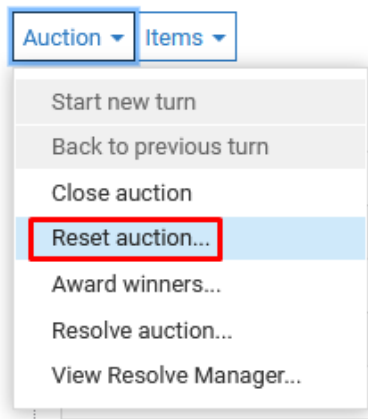# TELESTAFF BIDDING

## Contents

## Starting a Shift Bid (Master Sergeant)

1. Click on the **Bidding** icon
2. Find the appropriate shift bid/Troop and select **Manage**

Troop F Shift Bid Assignments | Manage
Auction Status: ⊘ Open

**The Bids are effective dated, which allows the system to determine who is eligible for the bid based on their attributes, like rank and current troop assignment. Each bid cycle, a new effective date must be set.**
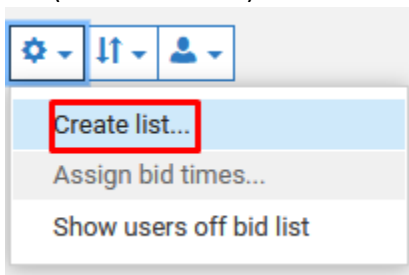
3. Select the Auction menu from the top middle and select **Reset Auction**.

Auction ▾ | Items ▾

Start new turn
Back to previous turn
Close auction
Reset auction...
Award winners...
Resolve auction...
View Resolve Manager...

4. Select "**Set a new effective date**" and enter the first day of the cycle being bid for.
5. Select "**Reset Formula ID based names**"
6. Select "**Clear bid records/status**" and pick "**Remove bids, wins and awards – Keep nothing**" from the selectable items.
   *This resets past bids and restarts the bidding process.*
7. Select **Save** from the bottom right of the screen. The new date range is now set.
8. After returning to the main bid screen, select the Gear icon from the top left and select Create List (or Recreate List).

⚙ ▾ | ↕ ▾ | 👤 ▾

Create list...
Assign bid times...
Show users off bid list

9. A bidders list will appear. Validate this list by looking at the personnel. It should be in the appropriate seniority order. Select **Create/Recreate** from the bottom right to create the list.
10. The last step is making all bidders active. Select All Bidders from the top left, select the Person icon, and select Bidder Properties.
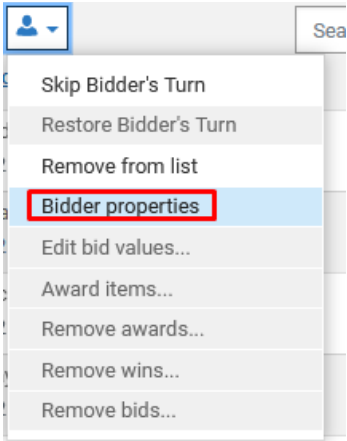
11. Select the **Bid Time** date selector to populate the bid time with the current time. Click off the window to close the popup.

12. Select **ASAP** to make all bidders active as of the bid time. Select **OK**. Now all bidders are ACTIVE and the bid is ready.
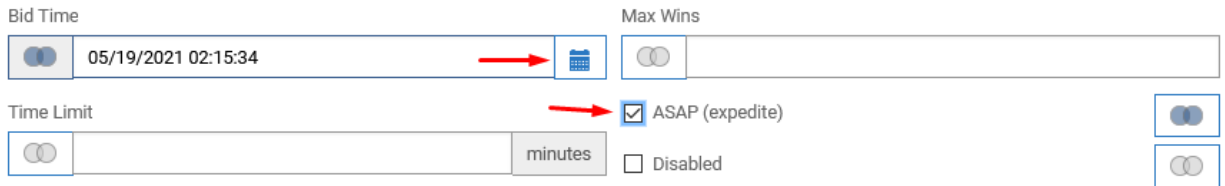


13. All bidders should now be listed as Active in the left pane. **Click the arrow next to their name to proxy bid for them**. Otherwise, they can log in and will see the bid under the Bidding section since they are now an active bidder. Bids are entered by placing a value as to their preference. Click Save in the bottom right when complete.

# End user bids (What the bidders do)

1. Navigate to Bidding and select the appropriate Shift Bid.
   *The user will only appear in the shift bid where they are a valid bidder.*

2. Each bidder will be presented a screen with 6 options they must choose from, using the numbers 1 through 6 to make their selection (1 being the most desirable).  Enter the number value in each box. Click **Save** after making a selection.

Troop A Shifts  6 items

| | |
|---|---|
| Days | 2 |
| Eves | 5 |
| Mids | 4 |
| Days/Eves | 3 |
| Eves/Days | 6 |
| No Change | 1 |

## \*\*\*If you do not want to make changes to your current shift/rotation select NO CHANGE as your #1 choice.

# Awarding & Managing bids (Master Sergeants)

1. Prior to this process, you should prepare a list of which shifts and rotations are available.

🔆 TIP: In addition to reviewing what shifts and rotations are available, it will also be useful to run an **Assignments Report** for your unit which includes which shift rotations a user is assigned to. This will be useful to reference when awarding bids – specifically for users who choose not to change their shift or would like a Day/Eve or Eve/Day rotation.

📋 Bidders who have bid have a B next to their name on the right side of the left pane. This can be used as a reference to reach out to personnel who have not yet bid.
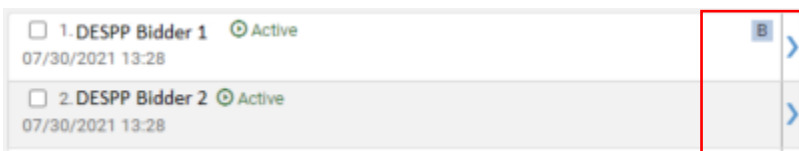


2. Navigate to Bidding and select Manage for the appropriate bid.
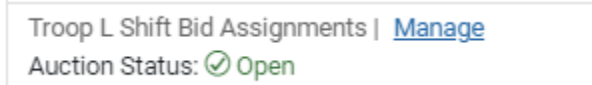


**The Manage screen is made up of two panels. The left pane are the people eligible to bid in this bid, and the right pane are the items that can be bid on. The troopers do not bid on the patterns directly, rather they bid only on the shift. As many troopers choose to remain on their existing shift and pattern, there is an option listed as No Change so that their choice is documented.**

3. Bidders are in seniority order.
   Wins are not permanent changes and can be undone prior to awarding the bid.

4. Starting with the first bidder, click on the arrow to the **right** of their name to confirm their bid. This will show you what the bidder chose.
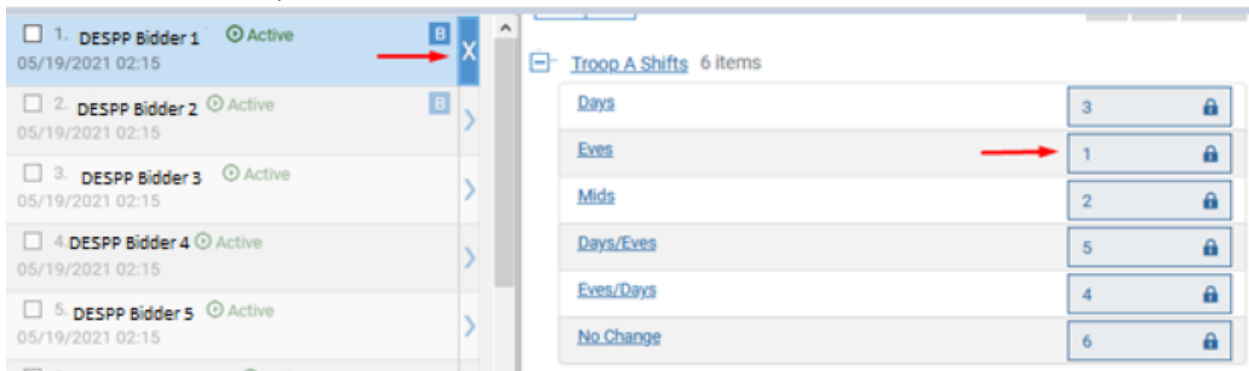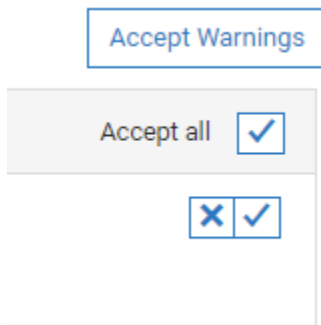


5. Deselect the bidder by clicking on the X where the arrow used to be.

6. Select the checkbox to the left of the bidder and the checkbox next to the **rotation**, then select the **Win** button from the top right of the screen.
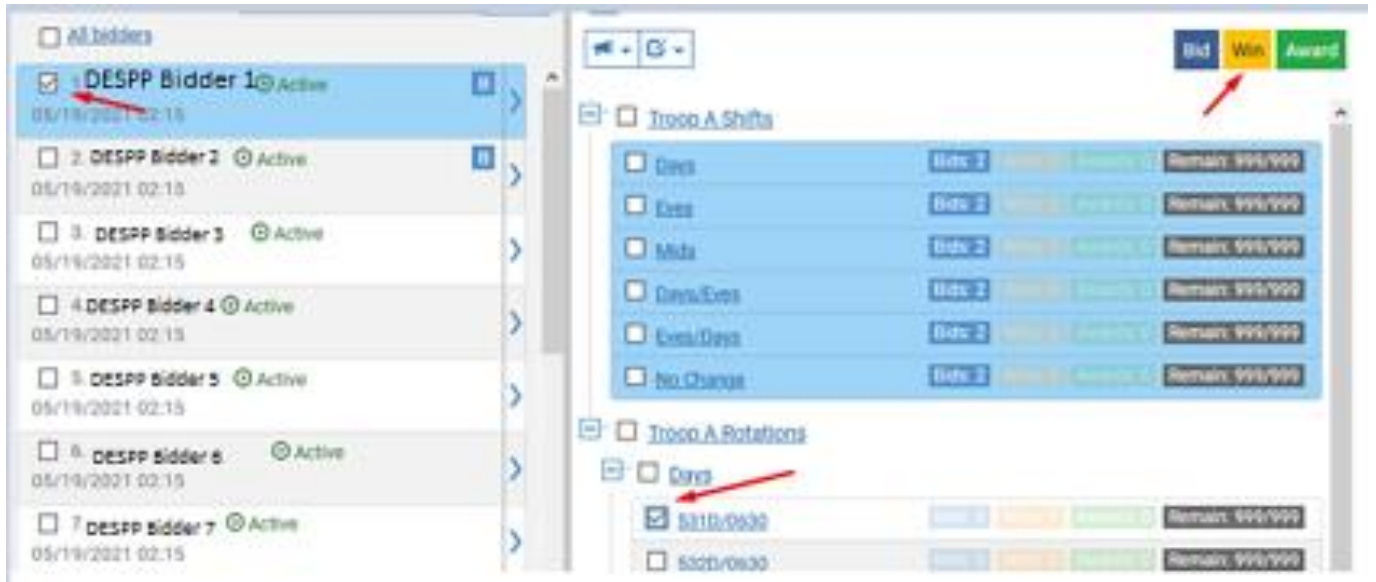


7. On the next screen, select **Accept All** and then select **OK** in the bottom right of the screen.



8. Once the bid has been awarded, a yellow "W" will appear next to their name in the Bidder's list.
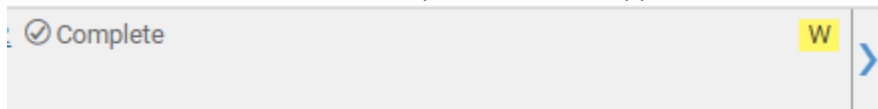


9. Repeat this process until all bidders are assigned.
   a. For bidders that will not be changing, award the **No Change** item to record a win.
      🔑 *Reference the Assignments Report or review the bidder's shift rotation in their profile to confirm that a No Change for that shift is available*

b. For bidders selecting **Days/Eves** or **Eves/Days**, award the Days/Eves or Eves/Days item to record a win and then manually update the shift rotation.
*Updating the shift rotation manually is done outside of the Bidding module in the employee's profile.*

🔑 *Reference the Assignments Report or review the bidder's shift rotation in their profile to confirm that a No Change for that shift is available*

❌ c. Patterns are controlled by quantity, so if a quantity is exhausted, the system will show "Sold Out" next to it.



10. Once complete and the bid is verified, the bid must be finalized. The Award phase is the final process in the bid. **This is final and cannot be undone in the bid itself**, as it modifies user assignments within TeleStaff by expiring their current assignments and giving them a new assignment based on their award using the effective date of the auction as the start date. **This cannot be undone through the bid, so only award the winners when complete with the rest of the bid process.**

    To award the bid, select the **Auction** menu and select **Award Winners**.

11. On the Manage Bid Items, validate the selections and select Accept Warnings from the top right if required. Select OK to process the Award. At this time the bid is complete and the bid can be closed.

12. Select the Auction menu from the main screen and select **Close Auction**. The bid can be reopened by selecting the menu again and selecting **Open Auction**. Bids and results can be archived by selecting the Items menu and selecting from the Export Bidders or Export Results options.

## Resetting a Win

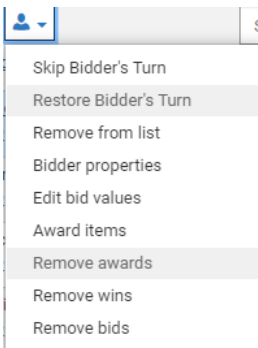Before the final bid has been awarded, bids that have already been set to WIN can be reset if needed. To remove an employee's WIN, follow the below steps.

1. Select the bidder from the list on the left
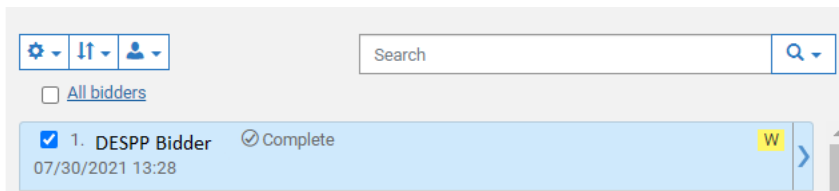


2. Click on the Person icon and select **Remove wins**



3. Select the **Accept All** check mark and then Select **OK**
4. The yellow "W" will be replaced with a blue "B" so that you can resubmit the bidder's bid.
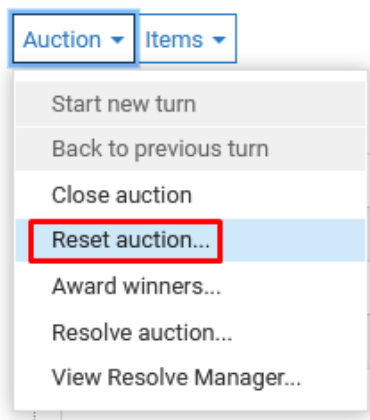
## Starting a Vacation Bid

1. Click on the **Bidding** icon
2. Find the appropriate shift bid/Troop and select **Manage**

Troop F Shift Bid Assignments | Manage
Auction Status: ⊘ Open

**The Bids are effective dated, which allows the system to determine who is eligible for the bid based on their attributes, like rank and current troop assignment. Each bid cycle, a new effective date must be set.**
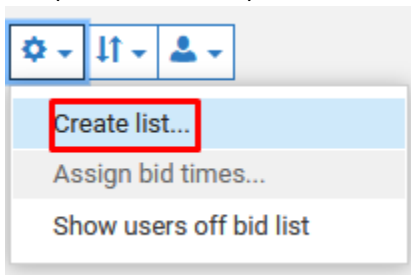
3. Select the Auction menu from the top middle and select **Reset Auction**.

Auction ▼ | Items ▼

Start new turn
Back to previous turn
Close auction
Reset auction...
Award winners...
Resolve auction...
View Resolve Manager...

4. Select "**Set a new effective date**" and enter the first day of the cycle being bid for.
5. Select "**Reset Formula ID based names**"
6. Select "**Clear bid records/status**" and pick "**Remove bids, wins and awards – Keep nothing**" from the selectable items.
   *This resets past bids and restarts the bidding process.*
7. Select **Save** from the bottom right of the screen. The new date range is now set.
8. After returning to the main bid screen, select the Gear icon from the top left and select Create List (or Recreate List).

✿ ▼ | ↕↑ ▼ | ♟ ▼

Create list...
Assign bid times...
Show users off bid list

9. A bidders list will appear.  Validate this list by looking at the personnel.  It should be in the appropriate seniority order.  Ties are broken randomly. Select **Create/Recreate** from the bottom right to create the list.
10. This bid is setup as a queue bid and proceeds in the order listed on the left pane by seniority. Once a bidder finishes their turn and selects Save, the next bidder becomes the active bidder. Bidders should make their choices carefully as changes to bids can cause cascading issues for other users who bid based on the results displayed at the time of their bid.
11. Users are now ready to bid.  To proxy for users, select the arrow next to their name on the left pane.  Select Bid next to the date the user wishes to bid for and the system will process the selection.  If there are any issues with that date, the system will display a descriptive error. Select **Save** when completed to finish the turn.

] Leave Picks  70 items

| 03-26-2021 | Bid |
| 03-27-2021 | Bid |
| 03-31-2021 | Bid |
| 04-01-2021 | Bid |
| 04-02-2021 | Bid |