



ScheduleSource TeamWork Employee Portal Guides Bidding

Version 1.0

Copyright 2016 ScheduleSource, Inc. All rights reserved.

ScheduleSource TeamWork Employee Portal Guide: Bidding

This document is the property of ScheduleSource, Inc., and may not be reproduced in whole or in part without prior written approval of ScheduleSource, Inc.

Copyright and Trademarks

TeamWork™ and TeamWork™ Mobile are trademarks of ScheduleSource, Inc.

Other product names mentioned in this document may be trademarks, service marks, or trade names of their respective companies and are hereby acknowledged.

Table of Contents

Chapter 1 – Introduction to Bidding	1
Overview.....	1
Bidding Workflow	1
Chapter 2 – Understanding Bidding	2
Overview.....	2
Bidding Stages	2
Bidding Definitions.....	3
Bidding Windows	5
Home Window.....	5
Settings Window	6
Messages Window.....	7
Search Window.....	8
Bid Sheet Window.....	9
Chapter 3 - How To's for Bidding.....	10
Overview.....	10
Opening a Bid.....	10
Finding Lines	11
Adding Bids	11
Prioritizing Choices.....	12
Checking Capacity.....	12
Bidding During Time Slot.....	12
Bids Assigned.....	13
Monitoring Messages	13
Using Optional Settings	13
Buddy Bidding.....	13
Proxy Bidding.....	14
Index.....	15



Chapter 1 – Introduction to Bidding

Overview

TeamWork provides an automated way of bidding on lines. Once your manager creates a bid, you can search for the time you would like to work and enter your primary choices and alternate choices. TeamWork helps you in each stage of the process.

To begin using Bidding, refer to the following:

- [Bidding Workflow](#)
- [Understanding Bidding](#)
- [How To's for Bidding](#)

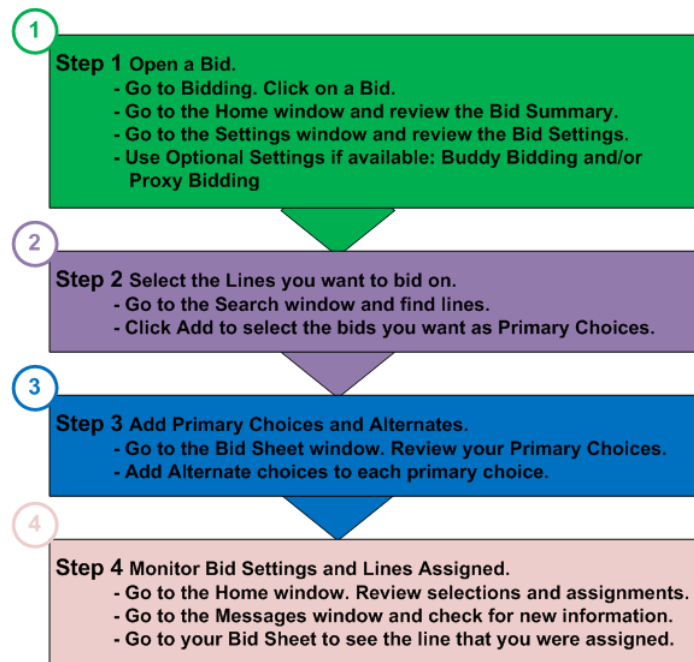
Bidding Workflow

First, your manager creates a bid that includes settings and ranking factors. It is in one of the following stages: Preview, Select, or Assign. As part of the bid, your manager also sets up lines, identifies employees who are eligible to bid, and may establish rounds that govern how the bid will occur and your role in it. For more information, see [Bidding Stages](#) and [Bidding Definitions](#).

Then you open the bid and review bid information. Search for the available lines in the Search window and take time to enter your primary choices and alternate choices in the Bid Sheet window.

Finally, you are assigned a line when you either bid on choices during your time slot, or when TeamWork or your manager assigns you a line based on your rank as well as your choices and alternates. How this happens depends on the way your company configures Bidding.

The bidding workflow includes the following tasks:



Chapter 2 – Understanding Bidding

Overview

You can use Bidding to set up a Bid Sheet for choosing line assignments. This chapter provides information on using TeamWork for Bidding. Included are:

- [Bidding Stages](#)
- [Bidding Definitions](#)
- [Bidding Windows](#)

Take a few minutes to understand how Bidding works and then refer to [How To's for Bidding](#).

Bidding Stages

Managers create bids that contain lines or shifts in TeamWork, and as they process these bids, you are able to preview, select, and in some cases, assign yourself to a line according to your search criteria, rank, and the stage a bid is in. Each of the Bidding stages is described in the following table.

Stage	Description
Setup	The setup stage is the initial stage a bid is in once it is created. This is a manager-only viewing stage and the bid is not yet visible to you. In the setup stage, your manager sets the date range, configures options, adds lines, adds employees, and calculates ranks for the employees who are eligible to bid.
Preview	The preview stage allows you to view lines, view your rank within the bid, and optionally set up buddy or proxy bidding. Your manager may still add or remove lines and employees from the bid, but you can still preview the bid and its lines if you have been assigned to it.
Select	The select stage allows you to start making choices on lines, creating saved searches as favorite schedules, and finalizing your Bid Sheet. This is the launch of the employee bidding process. At this stage, your manager is no longer able to edit employees who can bid or add or edit lines.
Assign	The assign stage begins the process of assigning employees to lines. Depending on the configuration of the bid, your manager may make assignments all at once, or follow a time-slot based approach where you bid during a specified time. If there is a time-slot approach, you can either self-assign during your time slot, if permitted in the bid rules, or let the system auto-assign based on the choices you entered in your Bid Sheet. The results are the same. You get the best line based on your rank and the information you entered.
Pause	The pause stage is an optional stage that your manager uses to stop a time-slot based bidding process temporarily. From a pause stage, you can still see lines and add bids to your Bid Sheet. But, before assignments can occur, your manager must return the bid to the assign stage.

Complete	The complete stage ends the bidding process. A manager puts the bid in a complete stage when all possible assignments are made and all adjustments are complete. In the complete stage, the bid is view-only for both you and your manager. A complete statement displays when you log in to TeamWork.
----------	--

Bidding Definitions

TeamWork uses the following terms in Bidding. Each is defined for your understanding.

Term	Description
Assigned	In Bidding, you are assigned to a line during a bidding process. TeamWork assigns you to a line based on your rank order in the bid settings as well as the choices you give the lines that display on your Bid Sheet. Depending on how your company handles bidding, you may also be able to assign yourself.
Bid	<p>In Bidding, the term <i>bid</i> is used as both a noun and a verb.</p> <ul style="list-style-type: none"> Bid as a noun — refers to the entire package of a date range, lines, employees, qualifications, choices, and assignments. Your manager creates a bid. The bids you are able to bid on display under Bidding when you log in to Bid Connect. Bid as a verb — is the process you use to make line selections or have lines assigned to you. You create a bid based on line selections and your saved searches, i.e., your favorite schedules. Your bids display on your Bid Sheet and are applied during bidding.
Bid Sheet	As an employee, you create a Bid Sheet that lists your line selections and saved searches. The Bid Sheet has several parts: Summary, Shifts, and Favorites. See the Bid Sheet Window for specific information.
Buddy Bidding	A buddy is an employee you choose to be ranked with for bidding privileges. Using buddy bidding, you can bid with your buddy at nearly the same time so you can select or be assigned to the same shifts. See the Settings Window for a description of contents and Buddy Bidding for instructions on using this Optional Setting.
Capacity	Each line has an associated capacity that identifies the number of employees needed to work the line.
Choice	Choice is the priority you give a line or a saved search. Each choice has a number, i.e., 1, 2, 3, and so on. You enter a choice and it represents your relative preference of that line.
Credentials	A credential represents a skill or capability that may be needed by an employee to perform a job. Some bids, depending on their settings, might require credentials.
Date Range	Each line has a date range that represents when the lines are scheduled. The process of bidding is completed prior to the start date of the line.
Employee	As a participant in a bid, you are an employee who is assigned to work a line. In Bidding, each employee is responsible for entering bids and choices.



Favorites	Favorites are the saved searches you create to allow you to view a subset list of lines that match your schedule choices. Saved searches are useful as a tool to find lines in a long list. Favorites are added to your Bid Sheet to enable you to choose many lines that might work for you.
Line	A line is a single-day work assignment or period of work duty. Bids include multiple lines. The Bid Sheet displays the lines that exist for the date range of the bid. Each line also has a capacity that identifies how many employees may work the line.
My Status	<p>My Status is a statement that reflects the bidding process and your individual position within it. There are four statuses: Pending, Skipped, Bidding, and Complete. They are defined as follows:</p> <ul style="list-style-type: none"> • Pending -waiting for your turn in the bidding process according to your rank and other employee bids. You can add line choices when you are in a pending status. • Skipped -you were not assigned a line during your time slot. This occurs when all of your choices have been assigned prior to your time slot. You may enter new bids at any time, and Bid Connect will assign you at the end of the next time slot. To avoid being skipped, ensure full coverage on your bid sheet. • Bidding -you are assigned a time slot and are preparing to bid according to your rank. You can add line choices when you are in a bidding status. • Complete -bids have all been assigned. You were assigned to a line.
Optional Settings	Optional Settings display on the Settings window when a bid is set up to allow for either buddy bidding or proxy bidding or both. When a bid is in the Preview stage, these additional Optional Settings provide a way for you to identify a buddy and a proxy. When a bid is set up that does not allow for either buddy bidding or proxy bidding, Optional Settings do not display on the Settings window. See the Settings Window for a description of contents and Using Optional Settings for instructions on using Buddy Bidding and Proxy Bidding.
Privileges	<p>Privileges are bid options your manager selects when setting up a bid. When you open a bid, go to the Settings window. These options display in Bid Settings under Privileges. See Settings Window for an explanation of the window. This section may be blank, or depending on the bid settings, it may include one or more of the following terms. Each is defined as follows:</p> <ul style="list-style-type: none"> • Full visibility — whether or not you can see how others bid. Visibility can be either open or closed. If open, this term displays. • Simulation — whether or not there is a period for simulating a bid prior to the actual bidding process. Allow simulation can be either yes or no. If yes, this term displays. • Self-Assign — whether or not you can assign yourself to a bid. Allow self-assign can be either yes or no. If yes, this term displays.
Proxy Bidding	You can select an employee to bid your lines for you. Proxy bidding allows another user to bid on your behalf without having to actually log in as you. However, when you designate a proxy, that employee must agree to accept the responsibility. Proxy Bidding is a yes or no option selected when your manager sets up a bid. If yes, go to Settings and view Proxy Bidding under Optional Settings. See the Settings Window for a description of contents and Using Optional Settings for instructions on using Proxy Bidding.



Rank	TeamWork uses rank criteria to help establish a relative position or order for assigning you to a bid. Your manager identifies the rank criteria when setting up a bid. Rank criteria may include one or several of the following: hire date, seniority date, agreement date, employee rank, or birth date.
Saved Searches	Saved searches are criteria you identify as factors to consider when selecting your schedule. They help you pick your ideal lines. When they are applied, they create a subset of lines you may want to bid on. Use them to filter long lists of lines to hone in on those that best meet your needs. You can bid on them as choices, and TeamWork uses them in making assignments.
Search	As an employee, you search for lines and add them to your Bid Sheet. You create saved searches that include criteria such as days off or specific location, work days, start time, end time, and hours per day or week. You can save these searches and use them to filter the available lines.
Time Slot	A time slot is an option your company may use to specify a period of time in which you can assign yourself to a line in a bid. If you do not bid within this time period, Bid Connect assigns you to a line based on your rank and the bid choices and favorites in your Bid Sheet.

Bidding Windows

When you open a bid, a menu bar displays with the following tabs:

- [Home Window](#)
- [Settings Window](#)
- [Messages Window](#)
- [Search Window](#)
- [Bid Sheet Window](#)

Each is explained in the following paragraphs.


Home Window

The Home window displays automatically when you open a bid. You can also click on the Home tab to display this window. Its contents summarize information about a bid. In addition, a list of tasks displays on the right. These provide links to other application windows and help messages that guide you in performing each task.

Home window contents include specific information for the bid you opened:

- **My Bids** — summarizes your bid activity for this bid

My Bids

- My position is #6.
- I've bid 3 lines. Total capacity = 7.
- I've bid 1 lines via favorites. Total capacity = 2.
-  My bid sheet capacity of 9 exceeds my position of 6.
- Result: I'm fully covered!

Explanation: This employee is position #6, the sixth person to bid or be assigned. The



employee has bid on 3 individual lines. The total capacity of those lines is 7 (some have a capacity greater than one.) In addition, the employee has a saved search or favorite that includes 1 line, and since there is a capacity of 2 for that line, there are 2 lines available that meet the criteria. Adding the two capacities together equals 9 lines. So, this employee is fully covered. In other words, the employee entered enough criteria to bid on or be assigned to one of these lines.

- **My Status**— summarizes the status of the bid and where you are in the bid process.

My Status	
• My Status:	Bidding
• Time slot:	Friday, July 08, 2016 [12:22 PM - 12:28 PM]
• Rank:	6

Explanation: This employee is prepared for bidding, is assigned a time slot based on the bidding schedule, and is the sixth person to bid.

- **Overall Status**— summarizes the bid stage and bid information

Overall Status	
• Stage:	Preview » Select » Assign » Paused » Complete
• Date Range:	6/27/2016 - 9/4/2016
• Messages:	1

Explanation: The bid is in the Assign stage, and that controls the tasks you can perform. For more information, see [Bidding Stages](#). The dates display for working the line once they are assigned as well as the number of bid-related messages. See the [Messages Window](#). In this example, there is one message.

Settings Window

The Settings window displays when you click the Settings tab. Its contents include Bid settings and, depending on how a bid is defined, optional settings display to enable you to use either Buddy Bidding or Proxy Bidding or both.

- **Bid** — summary of the bid you selected. Includes Name, Notes, Work Dates, and Privileges. For more information on Privileges, see [Bidding Definitions](#).

Settings - Evergreen, Erik (Erik)	
Bid	
Name:	Summer Schedules
Notes:	
Dates:	6/27/2016 - 9/4/2016
Privileges:	Simulation; Self Assign



- **Optional Settings for Buddy Bidding**— allows you to select a person to bid with. For more information, see the Buddy Bidding definition and the How to for [Buddy Bidding](#).

Optional Settings

Buddy Bidding

Rank me after:

Select a person who you want to be ranked after in the list. Your timeslot will be immediately after that person. Use your timeslot to see the person's assignment and select your assignment accordingly.

- **Optional Settings for Proxy Bidding**— allows you to designate a person to bid for you. For more information, see the Proxy Bidding definition in [Bidding Definitions](#) and the How To for [Proxy Bidding](#).

Optional Settings

Buddy Bidding

Rank me after:

Select a person who you want to be ranked after in the list. Your timeslot will be immediately after that person. Use your timeslot to see the person's assignment and select your assignment accordingly.

Proxy Bidding

My Proxy:

Select a person who you want to bid for you. The person must agree to be your proxy before access to your bids is granted.

Privileges:

Apple, Allison
Berry, Barbara
Cloud, Casey
Door, Dave
Evergreen, Erik
Gate, Gary
Hunt, Harold
Iron, Ivan
Jump, Joan
Kent, Kyra
Luck, Linda
Pickle, Petra

▼ 1-12 out of 12

Messages Window

The Messages window displays when you click the Messages tab. Its contents include messages that relate to the bid you opened. Managers and system administrators post messages. Refer to the following example.

Messages

Summer Schedules

Please bid the lines you'd like to work as soon as possible.
Thanks!
Bart

Posted By: Aspen, Bart; 6/26/2016



Search Window

The Search window displays when you click the Search tab. It includes a summary and lists all the specific lines in the bid. As you see lines that work with your schedule, you add them and prioritize your choices. The lines then display in your Bid Sheet in the order you choose.

You also find lines by creating and saving searches that filter the list of lines. You can create many saved searches to help you find lines. They display under Favorites on your Bid sheet and you prioritize them.

Each part of the Search window is defined as follows:

- **Summary window**— a brief summary displays information about your position relative to this bid. See the summary window and explanation of terms that follow.

My Status	My Rank	My Position	My Time slot	Stage	Assigned
BIDDING	7	7 of 13 employees.	Friday, July 08, 2016 [12:46 PM - 12:52 PM] 0 days 0 hours 07:18	Assign	6 of 13 employees.

- **My Status** - either Pending, Skipped, Bidding, or Complete. See [Bidding Definitions](#). In the example above, My Status is Bidding. Once you have finished bidding, your status changes to Complete.
- **My Rank** - your relative rank in the eligible group of bidders. Determined by the criteria your manager selects when setting up the bid. See [Bidding Definitions](#). In the example above, My Rank is 7. You are the seventh employee to bid.
- **My Position** - your relative position in the group of eligible bidders. Usually it is the same as rank, unless you are buddy bidding. In the example above, My Position is 7 out of 13 employees.
- **My Time slot** - if this is a time slot bid, your specific time slot date and time display. This column does not display if this is a Manager Invoked bid, i.e., your manager assigns you to a line. In the example above, My Time Slot is July 8, 2016. In addition, TeamWork alerts you to when that time slot is relative to the present time. It constantly updates and displays the information in days, hours, minutes, and seconds. In the example above, you have 0 days, 0 hours, 7 minutes, and 18 seconds in which to set up your bids prior to your bidding time slot.
- **Stage** - stage the bid is in. See [Bidding Stages](#). In the example above, the stage is Assign.
- **Assigned** - number of employees already assigned to lines in this bidding process. See [Bidding Definitions](#). In the example above, 6 out of 13 employees are assigned.
- **Find Shifts** — select criteria that help you narrow the search for lines to the ones you are most interested in working. Select the days of the week you would like to be off, or click **More Options** and add specific search criteria.
- **Results** — displays lines that meet your criteria. You can click to include a line on your Bid Sheet. A window displays for you to assign a choice.

For How To's using the Search window, see:

- [Finding Lines](#)
- [Adding Bids](#)
- [Prioritizing Choices](#)
- [Checking Capacity](#)



Bid Sheet Window

The Bid Sheet window displays when you click the Bid Sheet tab. It includes a summary and contains the lines you added from the Search window. They are prioritized according to your choices and display under Lines.

When you pick and prioritize your ideal schedules in the Search window, you create Saved Searches. If you bid on a Saved Search, it displays on the Bid Sheet window as Favorites. While your choices of lines take priority, Bid Connect uses your Favorites to assign you to lines if your top line choices are not available.

Each part of the Bid Sheet window is defined as follows:

- **Summary** — a brief summary displays information about your position relative to this shift bid. See the summary and explanation of terms that follow.

My Status	My Rank	My Position	My Time slot	Stage	Assigned
BIDDING	8	8 of 13 employees.	Friday, July 08, 2016 [12:52 PM - 12:58 PM]	Assign	7 of 13 employees.

- **My Status**- either Pending, Skipped, Bidding, or Complete. See [Bidding Definitions](#). In the example above, My Status is Bidding.
- **My Rank**- your relative rank in the eligible group of bidders. Determined by the criteria your manager selects when setting up the shift bid. See [Bidding Definitions](#). In the example above, My Rank is 8.
- **My Position**- your relative position in the group of eligible bidders. Usually it is the same as rank, unless you are buddy bidding. In the example above, My Position is 8 out of 13 employees.
- **My Time slot**- if this is a time slot bid, your specific time slot date and time display. This column does not display if this is Manager Invoked bid, i.e., your manager assigns you to a line. In the example above, My Time Slot is Friday, July 08, 2016 from 12:52 PM - 12:58 PM.
- **Stage**- stage the bid is in. See [Bidding Definitions](#). In the example above, the stage is Assign.
- **Assigned** - number of employees assigned in this bidding process. See [Bidding Definitions](#). In the example above, 7 of 13 employees are assigned.
- **Summary statement** — a brief statement that describes your Bid Sheet, summarizes where you are in the process, and provides guidance about what you should do.
 - ✔ tells you that your Bid Sheet capacity is adequate for your bidding position.
 - ✖ tells you that your Bid Sheet capacity is NOT adequate for your bidding position.
- **Lines** — individual lines that you add and prioritize as your 1st Choice, 2nd Choice, 3rd Choice, and so on. Individual lines have priority over favorites.
- **Favorites**— lists the ideal schedules you have saved and prioritized as choices.

For How To's using the Bid Sheet window, see:

- [Prioritizing Choices](#)
- [Checking Capacity](#)
- [Bidding During Time Slot](#)
- [Bids Assigned](#)



Chapter 3 - How To's for Bidding

Overview

The following How To's help you bid on lines. They include:

- [Opening a Bid](#)
- [Finding Lines](#)
- [Adding Bids](#)
- [Prioritizing Choices](#)
- [Checking Capacity](#)
- [Bidding During Time Slot](#)
- [Bids Assigned](#)
- [Monitoring Messages](#)
- [Using Optional Settings](#)

Opening a Bid

Click on a bid to open it. The Home window automatically displays and gives details about that bid and your position in it. See the [Home Window](#) and the [Settings Window](#) for a description of contents.

To open a bid:

1. Select the Bidding tab.
Bids display.
2. Select a bid.
Home window displays.
3. Review bid information.
4. To bid with a buddy or have someone bid for you via proxy, go to the [Settings Window](#) and see [Using Optional Settings](#).
5. To see if there are messages related to this bid, go to the [Messages Window](#) and see [Monitoring Messages](#).
6. To begin the bidding process, go to the [Search Window](#) and see [Finding Lines](#).



Finding Lines

Go to the Search window to find the available lines to bid on. Set up favorites to filter the list of lines and hone in on the best lines for you. Select and prioritize your choices. Choices and Favorites display on your Bid Sheet and TeamWork uses your choices as well as your favorites when it assigns lines.

To find lines:

1. Go to **Bidding** and open a bid.
2. Select the **Search** tab.
List of lines displays under Results.
3. Review your summary information for this bid. See the [Search Window](#) for more information.
4. Under Find Lines, select check boxes for days of the week you want off.
 - o Lines that meet your criteria display under Results.
 - o Your search is assigned a name and displays below the line, highlighted in yellow.
 - o Two buttons display to either Clear or Save the search.
 - o If Saved, it displays in the drop-down list and you can use it again or edit it.
5. To specify additional criteria to use when searching for lines, select **More Options**.
The Search Options window displays.
6. Enter additional search options and select **Apply**.
Results displays lines that meet your search criteria.

Adding Bids

After finding and displaying lines in the Search window, use the Add button under the My Bids column to add bids to your account. If you still need to find more or different lines, see [Finding Lines](#).

To add bids:

1. Go to **Bidding** and open a bid.
2. Select the **Search** tab.
List of lines displays under Results.
3. Select **Add** under My Bids column.
Bid window displays line information.
4. Use the drop-down list to enter a Choice
5. Select **Save**.
6. If this bid has been set up as a time slot bid, an **Assign Now** button displays during your time slot period for bidding.
7. To assign this line to yourself, select **Assign Now**.
Pop-up window prompts: Assign this line?
8. Select **OK**. The line is assigned to you.
Line information displays on your Bid Sheet window and your assigned line is highlighted in green.



Prioritizing Choices

Use the Search and Bid Sheet windows to prioritize your line selections, create saved searches, and bid on the best of those as favorites.

If you need to find more or different lines, see [Finding Lines](#). If you need to add more lines, see [Adding Bids](#).

To prioritize bids:

1. Open the Search window or Bid Sheet window and select a bid you added.
Bid window displays.
2. Using the drop-down menu, select or edit the choice. This is a relative rank you are giving this line. You may change it at any time prior to when a line is assigned.
3. Select **Save**.

To prioritize favorites:

1. Open the Bid Sheet window and select a Favorite.
Saved Search window displays. Remember, you created Saved Searches in the Search window when finding shifts.
2. Using the drop-down menu, edit the choice. This is a relative rank you are giving this saved search. You may change it at any time.
3. Select **Save**.

Checking Capacity

Use the Bid Sheet window to check capacity and determine your bidding status.

To check capacity:

1. Open the Bid Sheet.
Summary information displays on the top of the Bid Sheet window.
2. Review the Summary statement. For the definition of terms, see the [Bid Sheet Window](#).
Note: Your bid sheet capacity should exceed your position and you should be fully covered. If it does not, add more choices. See [Finding Lines](#) and [Adding Bids](#).

Bidding During Time Slot

Use the Search or Bid Sheet windows to bid during your time slot if your bid is a Time Slot bid.

Note: Remember that you can also bid in advance, and when your time slot arrives, TeamWork automatically picks the best available bid for you using your bid choices and favorites.

To bid during your time slot:

1. Open the Search window or Bid Sheet window and select a bid you added.
Bid window displays.
2. Verify your time slot is now.
3. Select the line you want to be assigned to you.
The Bid window displays.



4. Select **Assign Now**.
Pop-up window prompts: Assign this line?
5. Select **OK**. The line is assigned to you.
Line information displays on your Bid Sheet window and your assigned line is highlighted in green.

Bids Assigned

Use the Home window to review your bid assignment. If you entered bid choices in advance, TeamWork assigns you the best possible line based on the information you entered. If you entered a bid during a time slot, the summary information also displays on the Home window.

To review assigned bids:

1. Go to **Bidding** and open a bid.
Home window displays a summary of the bid.
2. To see details about the assigned line, select the **Bid Sheet** tab.
Bid Sheet window displays details about the assigned line. It is highlighted.

Monitoring Messages

Go to the Home page and check your bid settings, selections, and messages on a regular basis. When there are messages related to a specific bid, they are listed on the Messages page. See the [Home Window](#) and the [Messages Window](#).

To monitor messages:

1. Go to **Bidding** and open a bid.
Home window displays number of messages under Overall Status.
2. Select the **Messages** tab.
Message window displays the messages related to this bid.

Using Optional Settings

Optional Settings are [Buddy Bidding](#) and [Proxy Bidding](#). They are available for you to use when a manager sets up a bid that includes the options. When established in the bid, they display as Optional Settings in your Settings window. For a description of these features, see [Bidding Definitions](#) for Optional Settings, Buddy Bidding, and Proxy Bidding.

Instructions for using each follow.

Buddy Bidding

Use Buddy Bidding to identify an employee that you want to be ranked with so that the two of you are bidding at nearly the same time and can select or be assigned to the same line. To begin Buddy Bidding, open a bid and select the Settings tab.

Note: Buddy Bidding must be enabled by your manager when a bid is set up or this option is not available. The bid must also be in the Preview stage.



To use buddy bidding:

1. Go to **Bidding** and open a bid.
2. Select the **Settings** tab.
Optional Settings window displays for Buddy Bidding.
3. Type the first few letters of your buddy's last name. Select your buddy from the drop-down list.
4. Select **Save**.

Proxy Bidding

Use Proxy Bidding to identify an employee you designate to bid on your behalf. While they do not log in as you, they can view a bid and add lines for you if you are unable to log in. To use this optional feature, open a bid and select the Settings tab.

Note: Proxy Bidding must be enabled by your manager when a bid is set up or this option is not available.

To use proxy bidding:

1. Go to **Bidding** and open a bid.
2. Select the **Settings** tab.
Optional Settings window displays for Proxy Bidding.
3. Type the first few letters of your proxy's last name. Select your proxy from the drop-down list.
4. Select **Save**.
A status message displays and is highlighted in yellow: **Awaiting Acceptance**
5. Next, the employee you designated as your proxy logs in, opens the same bid, and selects the Settings window. They must click Accept to accept being your proxy.
6. After the designated proxy accepts, a message displays in your Settings window.
Status: **Accepted**
7. When it is time to select bids or to bid, the designated proxy logs in to the bid and selects the Settings window. Then, they click **View** in the Settings window.
8. The designated proxy completes the bidding process for you as your proxy.



Index

B

Bidding Definitions	3
Bidding Overview	1
Bidding Stages	2
Bidding Windows.....	5
Bidding Workflow	1
Buddy Bidding	13

H

How To's for Bidding	10
Adding Bids	11
Bidding During Time Slot.....	12
Bids Assigned.....	13

Checking Capacity	12
Finding Lines	11
Monitoring Messages	13
Opening a Bid.....	10
Prioritizing Choices.....	12
Using Optional Settings.....	13

P

Proxy Bidding.....	14
--------------------	----

U

Understanding Bidding	2
-----------------------------	---

