



ScheduleSource TeamWork  
Location Portal Guides  
Part II Additional Modules  
Tour Bidding Module

Version 1.0

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ScheduleSource TeamWork Location Portal Guides. Part II Additional Modules: Tour Bidding Module

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# Chapter 1 – Introduction to Tour Bidding

## Overview

Tour Bidding provides you with an automated way of creating shift bids and template bids. Once you create the bid and add lines, you make shift bids accessible so employees can bid on them. If you are creating a template bid, you simply assign employees to the lines. Employees do not interact with a template bid.

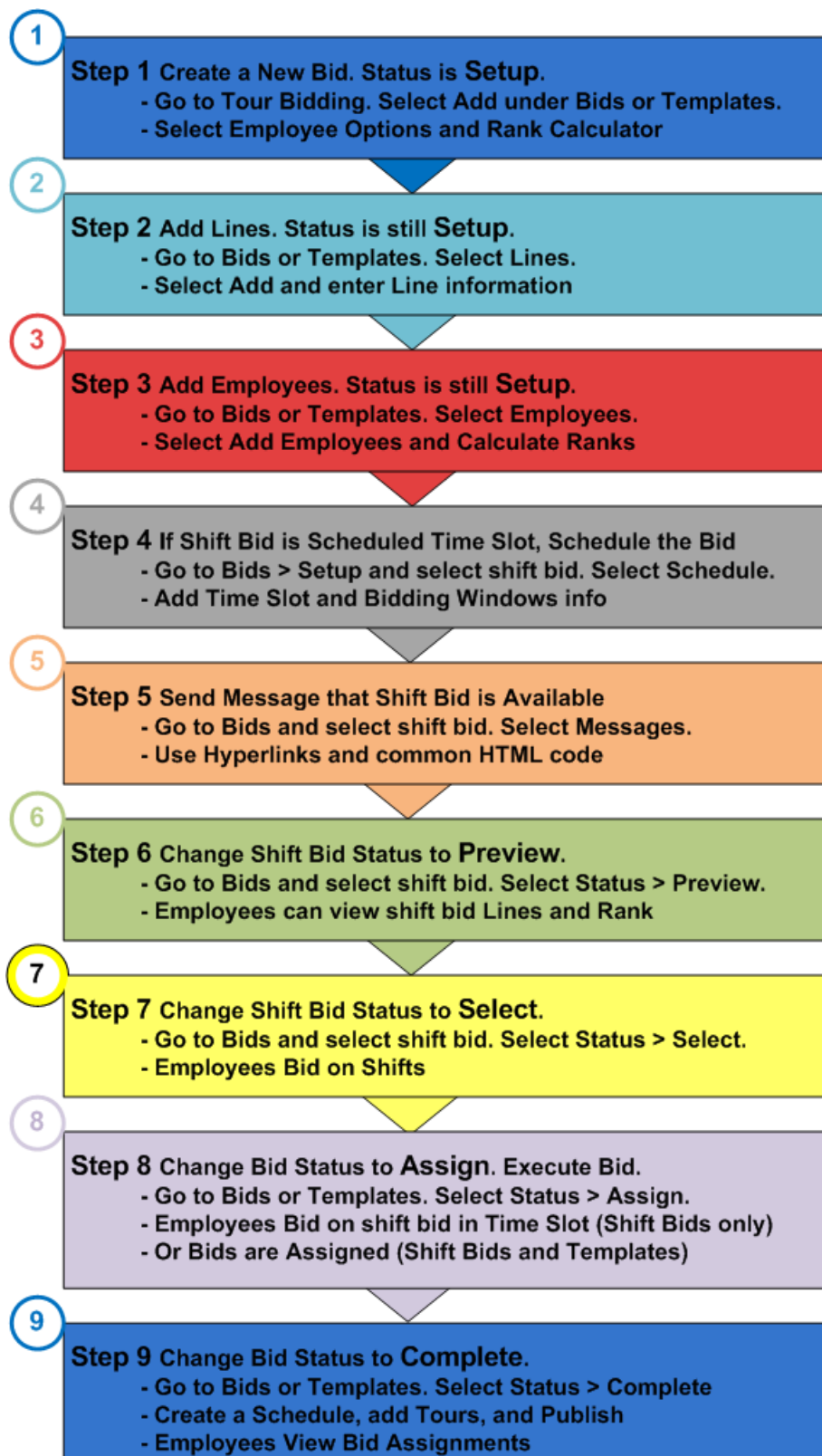
Descriptions of the two types of bids available in Tour Bidding follow:

- **Shift Bids** — provides an automated way of setting up and managing shift bids for many groups of employees. It allows you to adhere to employee contracts and agreements, rank participation in a bid by factors such as hire date and seniority, and provide a means for employees to get the best possible work schedule. Once bids are assigned and you give the bid a complete status, you can create a schedule using the tours and bid assignments.
- **Template Bids** — provides an efficient way of setting up bids for many employees. It allows you to rank employees and assign them to lines. Once bids are assigned and you give the bid a complete status, you can create a schedule using the tours and bid assignments.

The following diagram shows the tour bidding workflow.



# Tour Bidding Workflow



## Shift Bid Assignment

When you set up a shift bid, TeamWork assigns shift bids to employees in the order of rank using the specific bid settings you identify. Depending upon how bids are set up, employees can bid during a time slot, or TeamWork assigns shifts based on employee choices and favorites. If for some reason employees are skipped and need to enter more choices, TeamWork automatically assigns a bid at its next possible opportunity based on the choices entered. Managers can either schedule a bid or invoke the bid themselves.

## Template Bid Assignment

When you set up a template bid, you may gather information and then you make employee bid assignments. After the template bid is in the complete stage, use the bid assignments to create schedules.

## Using Tour Bidding in Schedules

After you complete a bid, you can use the shift bid and the template bid assignments to build schedules. In the Location portal, go to Schedules and add a schedule. When you select the option to add shifts to the schedule, select Tours. The lines in the shift bid or template bid, as well as the assigned employees, display in the schedule. When you publish the schedule, it displays on the employee's calendar in the Employee portal. See *How To's for Building and Managing Schedules*.

## See Also

The following address questions you may have about using Tour Bidding.

- How does Tour Bidding work? See [Understanding Tour Bidding](#) for workflow, bid stages, definitions, and a description of windows.
- How to set up and manage shift bids? See [How To's for Shift Bids](#). Follow the procedures to set up and manage shift bids.
- How to set up and manage template bids? See [How To's for Template Bids](#). Follow the procedures to set up and manage template bids.
- Can I run reports to see the particulars of a shift bid? See [Running Reports](#). ScheduleSource provides a group of fixed reports that quickly compile and display bidding information. Included are charts and graphs.



# Chapter 2 – Understanding Tour Building

## Overview

Review the following to gain an understanding of Tour Bidding. Included are:

- [Role Definitions for Tour Bidding](#)
- [Tour Bidding Stages](#)
- [Tour Bidding Terms](#)
- [Tour Bidding Windows](#)

## Role Definitions for Tour Bidding

Role definitions for the Tour Bid module apply to users in the Location portal. Once Tours & Tour Bidding is enabled in the Enterprise portal, a Tour Bid section displays in Location roles. The following roles apply to Location portal users. Tour bids are implemented in the Location portal and Employee portal.

## Tour Bidding Section Access

Action	Permission description...
Add Tour Bid	allows adding a tour bid
Edit Tour Settings	allows editing of the tour bid settings
Delete Tour Bid	allows for the deletion of a tour bid
Manage Bid Schedule	allows adding, editing, and deleting tour bid schedule
Manage Bid Status	allows adding and editing tour bid status
Commit Bid	allows performance of admin functions related to a tour bid
Manage Groups	allows assigning employees into groups for tour bidding
Manage Employees	allows adding, editing, and deleting employees from a tour bid
Manage Lines	allows adding, editing, and deleting of lines in a tour bid
Manual Assign	allows manual assignment of an employee to a tour bid



Action	Permission description...
Clear Assign	allows manual clearing of an employee from a tour bid
Reset Assign	allows resetting of a bid on the Status, Overview, and Selections windows
Invoke Assign	allows selection of manager invoked assignment on settings window
Manage Messages	allows adding, deleting, and editing messages related to a leave bid
Edit Leave Requests	allows adding, editing, and managing employee leave requests

## Tour Bidding Stages

As a manager, you create shift bids or template bids in TeamWork. Each bid moves through several stages, and there are different actions that you can perform in each stage. In shift bids, you are able to see how employees preview, select, and assign themselves to shifts. Each of the bid stages is described in the following paragraphs.

Stage	Description
Setup	The setup stage is the initial stage a bid is in once it is created. It is used in both shift bids and template bids. It is a manager-only viewing stage and the bid is not visible to employees. In the setup stage, you set the date range, configure options, add shifts, add employees, and calculate ranks for the employees eligible to bid on the shift bid. You can also delete a bid in the setup stage.
Preview	The preview stage is used only in shift bids. It allows employees to view shifts, view their rank within the shift bid, and optionally set up buddy or proxy bidding. You, as a manager, may still add or remove shifts and employees from the shift bid, but employees can still preview the shift bid and its shifts.
Select	The select stage is used only in shift bids. It allows employees to start making choices on shifts, creating saved searches as favorite schedules, and finalizing their Bid Sheets. This is the launch of the employee bidding process. At this stage, you are no longer able to edit employees who can bid on a shift bid or add or edit shifts.
Assign	<p>The assign stage begins the process of assigning employees to shifts. It is used in both shift bids and template bids, however, there are differences in its use.</p> <ul style="list-style-type: none"> <li>• In template bids, you assign employees to shifts during the assign stage.</li> <li>• In shift bids, depending on the configuration of the bid, you may make assignments all at once or follow a time-slot based approach where employees bid during a specified time. If there is a time-slot approach, employees can either self-assign during their time slot or let the system auto-assign based on the choices they entered in their Bid Sheet. The results are the same. Employees get the best shift based on their rank and bids they have entered.</li> </ul>



Stage	Description
Pause	The pause stage is used only in shift bids. It is an optional stage that you can use to stop a time-slot based bidding process temporarily. From a pause stage, employees can still see shifts and add bids to their Bid Sheet. But, before assignments can occur, you must return the shift bid to the assign stage.
Complete	The complete stage ends the bidding process. It is used in both shift bids and template bids. You put the shift bid in a complete stage when all possible assignments are made and all adjustments are complete. In the complete stage, the shift bid is view-only for both you and your employees. The complete shift bid displays under the list of shift bids and you can use the bid in building location schedules.

## Tour Bidding Definitions

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

Term	Description
Assigned	In Tour Bidding, employees are assigned to a shift during a bidding process. In shift bids, TeamWork assigns employees to a shift based on their rank order in the shift bid settings as well as the choices they give the shifts that display on their Bid Sheet. Depending on how your company handles bidding, employees may also be able to assign themselves. In template bids, you assign employees to shifts.
Assignment Trigger	Assignment trigger is used only in shift bids. You select Process Options when you set up a shift bid. Assignment Trigger is one of those options. It specifies whether the shift bid is either manager-invoked or takes place during a scheduled time slot. See the <a href="#">Settings Window</a> .
Bid	In Tour Bidding, the term <i>bid</i> is used as both a noun and a verb. <ul style="list-style-type: none"> <li><b>Bid as a noun</b> — refers to the entire package of a date range, shifts, employees, qualifications, choices, and assignments. As a manager, you create a shift bid or a template bid. The shift bids you have created display under Tour Bidding &gt; Bids in the Location portal. The shift bids employees are able to bid on display under Bidding when they log in to the Employee portal.</li> <li><b>Bid as a verb</b> — is the process employees use to make shift selections or have shifts assigned to them. You, as a manager, create a shift bid and employees bid on it. They are assigned a bid based on their shift selections and saved searches, i.e., their favorite schedules.</li> </ul>
Bid Sheet	As a manager, you can view employee Bid Sheets. Each employee creates a Bid Sheet for a shift bid that lists their shift selections and saved searches. The Bid Sheet has several parts: Summary, Shifts, and Favorites. See the <a href="#">Bid Sheet Window</a> for specific information.



Term	Description
Bidding Options	You select Bidding Options when you set up a shift bid. They include: Requires Qualifications, Buddy Bidding, and Proxy Bidding. See the definition of each term as well as the <a href="#">Settings Window</a> .
Buddy Bidding	You designate Bidding Options when you set up a shift bid. One of these options is Buddy Bidding. A buddy is an employee who chooses to be ranked with another employee for bidding privileges. When a bid is in the Preview stage, employees can use buddy bidding to bid with their buddy at nearly the same time so they can select or be assigned to the same shifts. As a manager, you enable buddy bidding when you set up a shift bid and place it in the Preview stage.
Capacity	Each line or shift has an associated capacity that identifies the number of employees needed to work the shift. You use capacity when you create lines.
Choice	Choice is the priority employees give a shift or a saved search. Each choice has a number, i.e., 1, 2, 3, and so on. Employees enter a choice and it represents their relative preference of that shift.
Date Range	Each shift has a date range that represents when the shifts are scheduled. The process of bidding is completed prior to the start date of the shift.
Employee	As a participant in a shift bid, employees are assigned to work a shift. In Shift Bidding, each employee is responsible for entering bids and choices.
Employee Options	You designate Employee Options when you set up a shift bid. These options display as Privileges on the employee Settings window. Each is defined as follows: <ul style="list-style-type: none"> <li>• <b>Visibility</b> — whether or not employees can see how others bid. Visibility can be open or closed. If open, this term displays under Bid Privileges on the employee Settings window.</li> <li>• <b>Allow Simulation</b> — whether or not there is a period for employees to simulate a bid prior to the actual bidding process. Allow simulation can be either yes or no. If yes, this term displays under Bid Privileges on the employee Settings window.</li> <li>• <b>Allow Self-Assign</b> — whether or not employees can assign themselves to a bid. Allow self-assign can be either yes or no. If yes, this term displays under Bid Privileges on the employee Settings window.</li> </ul>
Favorites	Favorites, used in shift bids, are the saved searches employees create to allow them to view a subset list of shifts that match their best schedule choices. Saved searches are useful as a tool to find shifts in a long list. Favorites are added to an employee Bid Sheet to enable them to choose many shifts that might work for them.



Term	Description
My Status	<p>My Status is a statement on Employee portal Home window that launches when an employee selects Bidding. It reflects the bidding process and the individual employee position within it. There are four statuses: Pending, Skipped, Bidding, and Complete. They are defined as follows:</p> <ul style="list-style-type: none"> <li>• <b>Pending</b> –waiting for employees' turn in the bidding process according to their rank and other employee bids. Employees can add shift choices when they are in a pending status</li> <li>• <b>Skipped</b> –an employee was not assigned a shift during a time slot. This occurs when all of their choices were assigned prior to their time slot. They can enter new bids at any time, and TeamWork assigns them at the end of the next time slot. To avoid being skipped, employees should ensure full coverage on their bid sheet.</li> <li>• <b>Bidding</b> – an employee is assigned a time slot and is preparing to bid according to rank. Employees can add shift choices when they are in a bidding status.</li> <li>• <b>Complete</b> – bids have all been assigned. All employees were assigned to a shift.</li> </ul>
Optional Settings	You designate Bidding Options when you set up a shift bid to allow for either buddy bidding or proxy bidding or both. They display on the employee Settings window as Optional Settings. These additional Optional Settings are sections of the window that provide a way for employees to identify a buddy and a proxy bidder. When a shift bid is set up that does not allow for either buddy bidding or proxy bidding, these Optional Settings do not display on the employee Settings window.
Process Options	You select Process Options when you set up a shift bid. They include: Force Qualification Assignments and Assignment Trigger. See the definitions for each term as well as the <a href="#">Settings Window</a> .
Proxy Bidding	You designate Bidding Options when you set up a shift bid. One of these options is Proxy Bidding. Proxy bidding allows one employee to bid for another employee without having to actually log in as them. However, the designated proxy bidder must agree to accept the responsibility. As a manager, you enable proxy bidding when you set up a shift bid.
Rank Calculator	You designate Rank Calculator options when you set up a shift bid or a template bid. Methods include Timestamp (first come, first served) or Criteria (below). If you select Criteria, TeamWork uses rank criteria to help establish a relative position or order for assigning employees to a shift bid. Rank criteria may include one or several of the following: hire date, seniority date, agreement date, employee rank, or birth date.
Requires Qualifications	You designate Bidding Options when you set up a shift bid. One of these options is Requires Qualifications. A qualification represents a skill or capability that may be needed by an employee to perform a job. As a manager, you enable requiring qualifications when you set up a shift bid. See the <a href="#">Settings Window</a> .



Term	Description
Saved Searches	Saved searches are criteria employees identify as factors to consider when selecting their schedule. They help them identify ideal shifts. When they are applied to a search, they create a subset of shifts employees may want to bid on. Employees can prioritize them as choices, and TeamWork uses them in making assignments.
Search	Employees use the Search window to search for shifts and add them to their Bid Sheet. They create saved searches that include criteria such as days off or specific workgroup, work days, start time, end time, and hours per day or week. They can save these searches and use them to filter the available shifts in a shift bid.
Shift	A shift is a single-day work assignment or period of work duty. Shift bids include multiple shifts. The Bid Sheet displays the shifts that exist for the date range of the shift bid. Each shift also has a capacity that identifies how many employees may work the shift. As a manager, you select the shifts when you set up a shift bid.
Shift Bid	A shift bid refers to the entire package of a date range, shifts, employees, qualifications, choices, and assignments. As a manager, you create a shift bid. Shift bids include the scheduled shifts that employees are assigned to work.
Time Slot	A time slot is an option your company may use to specify a period of time in which employees can assign themselves to a shift in a shift bid. It is not used in template bids. If employees do not bid within this time period, TeamWork assigns them to a shift based on their rank and the bid choices and favorites in their Bid Sheet.

## Tour Bidding Windows

When you select Tour Bidding and open a shift bid, a menu bar displays with the following tabs. Click on a tab to display the associated window. Review the following window examples and the associated description of contents.

- [Settings Window \(Bids\)](#) or [Settings Window \(Templates\)](#)
- [Groups Window](#)
- [Lines Window](#)
- [Employees Window](#)
- [Schedule Window](#)
- [Messages Window](#)
- [Status Window](#)
- [Assignments Window](#)
- [Bid Sheet Window](#)
- [Admin Window](#)
- [History Window](#)
- [Reports Window](#)



## Settings Window (Bids)

The Settings window displays automatically when you open a shift bid or a template bid. If you are adding a new bid, the same window displays with an *Add New* title. Contents are identical whether the bid is new or already created. However, there are differences between a Shift bid and a Template bid. If you are creating a Template bid, see [Settings Window \(Templates\)](#).

Once a shift bid is set up and saved, you click on the Settings tab to display this window, the settings for a shift bid.

**Settings**

\*Name: Spring-Summer Gate Schedules

\*Start: 3/14/2016 \*Weeks: 26 Sunday, September 11, 2016

Notes:

**EMPLOYEE OPTIONS:**

Visibility: Closed

Allow simulation: No

Allow self-assign: No

**RANK CALCULATOR:**

Method: Criteria (below)

1st: ---Ignore --- Ascending

2nd: ---Ignore --- Ascending

3rd: ---Ignore --- Ascending

**BIDDING OPTIONS:**

Require Skills: No

Require Credentials: No

Buddy Bidding: No

Proxy Bidding: No

**PROCESS OPTIONS:**

Force Credential Assignments: No

Assignment Trigger: Manager Invoked

\* - Required Field **Save**

[Delete]

- **Name and Date Range** — name of the shift bid, start date, weeks duration, and notes.
- **Employee Options** — visibility, simulation, and allow self-assign. See [Tour Bidding Definitions](#) for Employee Options. These options display on the Employee Settings window as Privileges.
- **Rank Calculator** — select method as either Timestamp (first come, first served) or Criteria (below). If Criteria, see [Tour Bidding Definitions](#) for Rank Calculator. If you select a Timestamp method, rankings do not apply.
- **Bidding Options** — see [Tour Bidding Definitions](#) for Optional Settings.



- **Process Options** — Review the following terms and their meanings.

**Force Qualification Assignments** — yes or no. If yes, assignment processor tracks the remaining qualified employees for shifts. If there are no excess qualified employees, the remaining qualified employees are assigned to this shift bid, regardless of their bids. This ensures coverage of shifts with qualifications.

**Assignment Trigger** — Scheduled Time Slot or Manager Invoked. See the following definition of terms.

Term	Definition
Scheduled Time Slot	You schedule bidding windows to take place during a designated time period. When bid status is Assign, employees self-assign during their bidding time slot.
Manager Invoked	You change the bid status to Assign, and the TeamWork assignment processor begins. TeamWork assigns choices to employees until process is complete or an employee cannot be assigned. Does not skip employees, but stops on an employee who cannot be assigned. Requires employee to self-assign. Once employee is assigned, manager invokes assignment processor again. Processor assigns choices until complete. <b>Note:</b> If you use the Timestamp (first come, first served) method, you must use a Manager Invoked Assignment Trigger.

For the How To using the Settings window, see [Adding Shift Bids](#).

## Settings Window (Templates)

The Settings window displays automatically when you open a template bid. If you are adding a new bid, the same window displays with an *Add New* title. Contents are identical whether the bid is new or already created.

### Add New

Copy Data:  (Groups, Employee , & Lines will be copied)

\*Name:

\*Start:

\*Weeks:

Notes:

EMPLOYEE OPTIONS:

Visibility: Closed

RANK CALCULATOR:

Method: Criteria (below)

1st: ---Ignore--- Ascending

2nd: ---Ignore--- Ascending

3rd: ---Ignore--- Ascending

\* - Required Field

Save



- **Name and Date Range** — name of the shift bid, start date, weeks duration, and notes.
- **Employee Options** — visibility, simulation, and allow self-assign. See [Tour Bidding Definitions](#) for Employee Options. These options display on the Employee Settings window as Privileges.
- **Rank Calculator** — select method as either Timestamp (first come, first served) or Criteria (below). If Criteria, see [Tour Bidding Definitions](#) for Rank Calculator. If you select a Timestamp method, rankings do not apply.

## Groups Window

The Groups window displays when you click the Groups tab. Click Add to add groups. This is an advanced option you can use in special circumstances when you want to run the bid by groups. For help in using this feature, contact ScheduleSource support. The following is an example of how it might look.

Groups <span>Add</span>		
Drag a column header and drop it here to group by that column		
Name	[Rank]	Notes
Group A	1	
Group B	2	

For the How To using the Groups window, see [Adding Groups to a Shift Bid](#) or [Adding Groups to a Template Bid](#).

## Lines Window

The Lines window displays when you click the Lines tab. Click Add to add shifts. If TeamWork is integrated with another system, this information may be displayed automatically. The following is an example of how it might look.


















Lines <span>Add</span>										
Name	Pattern	Station	Start Time	End Time	Hours	Days	Capacity	Total Hours		
Gate 1 Day Shift	T W T F S S M	Gate Agent	8:00 AM	4:00 PM	40.00	7	3	120.00		
Gate 1 Day Shift 4/10s	T W T F S S M	Gate Agent	6:00 AM	4:00 PM	40.00	7	3	120.00		
Gate 1 Night Shift	T W T F S S M	Gate Agent	4:30 PM	1:00 AM	40.00	7	3	120.00		
Gate 1 Night Shift 4/10s	T W T F S S M	Gate Agent	4:30 PM	3:00 AM	40.00	7	1	40.00		
Total: 10										
										Delete

For the How To using the Lines window, see [Adding Lines to a Shift Bid](#) or [Adding Lines to a Template Bid](#).



## Employees Window

The Employees window displays when you click the Employees tab. This window shows information loaded from Staff Admin. From this window, you can add employees to the shift bid and calculate their rank. The following is an example of how it might look.

Employees				
Add		Calculate Ranks		
Name	Employee	Rank	Order	
Apple, Allison	Allison	1	1	
Berry, Barbara	Barbara	2	2	
Cloud, Casey	Casey	3	3	
Door, Dave	Dave	4	4	
Evergreen, Erik	Erik	5	5	
Ferry, Fern	Fern	6	6	
Gate, Gary	Gary	7	7	
Hunt, Harold	Harold	8	8	
Iron, Ivan	Ivan	9	9	
Jump, Joan	Joan	10	10	
Kent, Kyra	Kyra	11	11	
Luck, Linda	Linda	12	12	
Pickle, Petra	Petra	13	13	
Snap, Susan	Susan	14	14	
Valley, Vera	Vera	15	15	
Zabowski, Zach	Zach	16	16	
				 Delete

For the How To using the Employees window, see [Adding Employees to a Shift Bid](#) or [Adding Employees to a Template Bid](#).

**Note:** While the bids display in the Employee portal under Bidding, employees cannot open a template bid. They can open a shift bid, and search for lines and make bid choices. When a bid is complete and you use it in a schedule, employees see their assigned shifts.



## Schedule Window

When you select the Scheduled Time Slot on your bid settings window as the Assignment Trigger under Process Options in a shift bid, the Schedule tab displays. To launch this window, click the Schedule tab. Use it to set up the schedule for time slot bids.

### Schedule

**Time Slots:**

\* Slot Size: 6 Minutes
\* Employees: 1 Per Slot

**Bidding Windows:**

*Start	*End	Hours	Slots
3/7/2016 12:00 PM	3/7/2016 2:00 PM	2.0	20
		2.0	20

\* - Required Field
Save

Counts	Assigned Slots:
Total slots: 20	Starting with: Apple, Allison
Employees: 16	Time slot: Monday, March 07, 2016 [12:00 PM-12:06 PM]
Extra slots: 4	Reset to: 3/7/2016 12:00 PM
	Assign Update
	16 timeslots updated

- **Slot Size** — amount of each time slot in minutes. The default is 6 or 10 time slots processed per hour.
- **Employees** — number of employees per slot. Default is 1.
- **Start** — start time of bid. This includes date and time. The window updates and automatically displays another line with the next consecutive day so that you can quickly enter a large number of bidding windows. Simply delete these additional time periods if not needed.
- **End** — end time of bid. This includes date and time. See above description. Window updates automatically when you enter an end time.
- **Save** — the number of hours and slots update automatically when you click Save.
- **Counts** — displays summary information for the bid.
- **Assign Slots** — displays starting employee, time slot, and allows you reset a bid. Enter reset information and click Update to reset.

For the How To using the Scheduling window, see [Scheduling a Time Slot Shift Bid](#).



## Messages Window

The Messages window displays when you click the Messages tab. Use Add to add messages that relate to the shift bid you created. These messages display in the employees' accounts.

The screenshot shows a web interface with a 'Messages' tab. Below the tab is an 'Add' button. A modal window titled 'Messages' is open, containing a form with the following fields: 'Effective Dates:' with two date pickers, 'Title:' with a text input, and 'Text:' with a large text area. At the bottom of the modal are 'Save' and 'Delete' buttons.

The following features are supported:

- **Hyperlinks** — copy and paste URLs (<http://www.google.com>) into a message and they convert to hyperlinks. For example, you may refer employees to an intranet site to review an updated job description. Copy and paste the link into your message.
- **HTML Code** — use html code at the beginning and end of text you want to highlight or list in some way. Refer to the following examples:

**Italic** — `<i>text to display in italic. </i>` It displays like this: *text to display in italic.*

**Bold** — `<b>text to display in bold. </b>` It displays like this: **text to display in bold.**

**Line Break** — `<br>` at the end of a line forces the following text to the next line.  
End of first sentence. `<br>` Beginning of second sentence. It displays like this:

End of first sentence.  
Beginning of second sentence.



**Numbered List** — message text can contain a list of numbered items

```
<ol>
  <li>First item in numbered list.</li>
  <li>Second item in numbered
list.</li>
  <li>Third item in numbered list.</li>
</ol>
```

It displays like this:

1. First item in numbered list.
2. Second item in numbered list.
3. Third item in numbered list.

**Bullet List** — message text can contain a bullet list, referred to as an unordered list

```
<ul>
  <li>First item in bullet list.</li>
  <li>Second item in bullet list.</li>
  <li>Third item in bullet list.</li>
</ul>
```

It displays like this:

- First item in bullet list.
- Second item in bullet list.
- Third item in bullet list.

For the How To using the Messages window, see [Entering a Message for the Shift Bid](#) or [Entering a Message for the Template Bid](#).

## Status Window

The Status window displays when you click the Status tab. Use it to change the shift bid stage or the template bid stage. See [Tour Bidding Stages](#). You can also use this window to assign an employee to a shift and to reset bidding. There are more stages available in the shift bid window than the template bid window. Refer to the screen examples that follow.

**Note:** To use a bid for adding shift assignments to a schedule, the bid must have a status of **Complete**.

### Shift Bid Status Window

Status			
Stage: <input type="radio"/> Setup <input type="radio"/> Preview <input type="radio"/> Select <input type="radio"/> Paused <input type="radio"/> Assign <input checked="" type="radio"/> Complete <input type="button" value="Save"/>			
Assigned	Waiting for	Time slot	Actions
4 of 4 employees.			



## Template Bid Status Window

**Status**

Stage:
 ☐ Setup
 ☒ Assign
 ☐ Complete
 Save

Assigned

Actions

5 of 8 employees.
 Assign
Reset

For the How To's using the Template Bid Status window, see [Changing the Status of a Template Bid](#).

## Assignments Window

The Assignments window displays when you click the Assignments tab. Use it to review bids and assignments. You can also use this window to assign an employee to a shift and to reset bidding.

Settings
 Groups
 Lines
 Employees
 Schedule
 Messages
 Status
 **Assignments**
 Bid Sheet
 Admin
 History
 Reports

**Status**

Assigned
 Waiting for
 Time slot
 Actions

4 of 4 employees.
 Assign
Reset

**Bids and Assignments**

Search:  Type name to search...

☒ Employee
☐ Line

Name	Pattern	Station	Start Time	End Time	Hours	Capacity	Bids	Assigned
Gate 1 Day Shift	M T W T F S S	Gate Agent	8:00 AM	4:00 PM	40.00	3	[Rank=3, Choice=3rd] Pickle, Petra	[Rank=2, Choice=1st] Gate, Gary [Rank=4, Choice=1st] Valley, Vera [Edit]
Gate 1 Day Shift 4/10s	M T W T F S S	Gate Agent	6:00 AM	4:00 PM	40.00	3	[Rank=2, Choice=2nd] Gate, Gary	[Rank=1, Choice=1st] Apple, Allison [Rank=3, Choice=1st] Pickle, Petra [Edit]
Gate 1 Night Shift	M T W T F S S	Gate Agent	4:30 PM	1:00 AM	42.50	3	[Rank=4, Choice=2nd] Valley, Vera	[Edit]
Gate 1 Night Shift 4/10s	M T W T F S S	Gate Agent	4:30 PM	3:00 AM	42.00	1	[Rank=1, Choice=2nd] Apple, Allison [Rank=3, Choice=2nd] Pickle, Petra	[Edit]

For the How To's using the Assignments window, see [Monitoring Employee Bids](#) and [Manually Assigning a Shift to an Employee](#).



## Bid Sheet Window

The Bid Sheet window displays when you click the Bid Sheet tab. You can select an employee and display that employee's Bid Sheet. It includes a summary and contains the shifts the employee added from the employee Search window. The window shows the shift choices the employee has selected and prioritized. In a template bid, only assigned lines display.

Settings Groups Lines Employees Messages Status Assignments **Bid Sheet** Admin History Reports

Employee (Type last name to search...)  
Gate, Gary

### Bid Sheet

**SUMMARY**  
 My bid sheet capacity of 4 exceeds my position of 2. I'm fully covered!

**LINES**

Click name or pattern to view details

Choice	Name	Pattern	Station	Start Time	End Time	Hours	Capacity	Available
<b>1st</b>	Gate 1 Day Shift 4/10s	MTWTFSS	Gate Agent	6:00 AM	4:00 PM	40.00	3	3
<b>2nd</b>	Gate 1 Night Shift 4/10s	MTWTFSS	Gate Agent	4:30 PM	3:00 AM	40.00	1	1

**FAVORITES**

Choice	Favorite	Capacity	Available
<b>1st</b>	Mon=Off	0	0
<b>2nd</b>	Wed=Off	0	0

Note: The selections above might overlap.  
To avoid counting duplicates, capacity and available are only counted in the highest choice found.

4 4

This employee also created Favorites by saving searches in the Search window. They display on the Bid Sheet window as Favorites. While employee choices of shifts take priority, TeamWork uses their Favorites to assign shifts if that employee's top shift choices are not available.

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

- **Summary statement** — a brief statement that describes the employee's Bid Sheet, summarizes where the employee is in the process, and provides guidance about what that employee should do.
  - tells you that the employee's Bid Sheet capacity is adequate for their bidding position.
  - tells you that the employee's Bid Sheet capacity is NOT adequate for their bidding position.
- **Shifts** — individual shifts that the employee added and prioritized as the 1<sup>st</sup> Choice, 2<sup>nd</sup> Choice, 3<sup>rd</sup> Choice, and so on. Individual shifts have priority over favorites.
- **Favorites** — lists the saved searches the employee created and prioritized as choices.



For the How To's using the Bid Sheet window in shift bids, see [Monitoring Employee Bids](#) and [Manually Assigning a Shift to an Employee](#). For How To's using the Bid Sheet window in template bids, see [Reviewing Employee Bids in Template Bids](#).

## Admin Window

The Admin window displays when you click the Admin tab. From this window, you can push completed bids to external systems.

Settings	Groups	Lines	Employees	Schedule	Messages	Status	Assignments	Bid Sheet	Admin	History	Reports
<b>Admin</b>											
Item	Description	Execute									
Recalculate Lines	Updates the statistics for each line. Only needed when updating pre-2013 data to the new format. Can be run to ensure statistics are calculated correctly and are current.	<input type="button" value="Recalculate"/>									
Assignment Processor	Processor has not yet executed.	<input type="button" value="Reset"/>									

For the How To using the Admin window, see [Performing Admin Functions in a Shift Bid](#).

## History Window

The History window displays when you click the History tab. You can quickly view your actions and filter on a specific activity. For example, the following lists choices employees added for shifts.

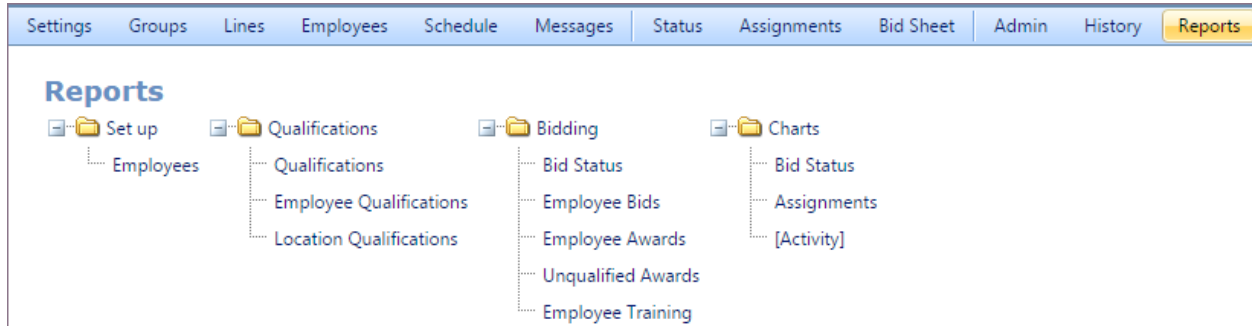
Settings	Groups	Lines	Employees	Schedule	Messages	Status	Assignments	Bid Sheet	Admin	History	Reports
<b>History</b>											
Timestamp		Action		By		For					
<input type="text"/> <input type="button" value="Calendar"/> <input type="button" value="Clock"/>		<input type="text"/> <input type="button" value="All"/>		<input type="text"/>		<input type="text"/>		<input type="button" value="Apply"/>			
Timestamp	Action	Source	Summary	By	For						
3/6/2016 3:19 PM	LineEdit	Gate 1 Day Shift 4/10s		Aspen, Bart							
3/6/2016 3:18 PM	LineAdd	Gate 1 Day Shift 4/10s		Aspen, Bart							
3/6/2016 3:18 PM	LineDelete			Aspen, Bart							
3/6/2016 3:17 PM	LineEdit			Aspen, Bart							
3/6/2016 3:16 PM	LineAdd			Aspen, Bart							
3/6/2016 3:16 PM	LineEdit	Gate 1 Day Shift		Aspen, Bart							
3/6/2016 3:15 PM	LineAdd	Gate 1 Day Shift		Aspen, Bart							
3/6/2016 3:15 PM	LineDelete			Aspen, Bart							
3/6/2016 3:14 PM	LineDelete			Aspen, Bart							
2/26/2016 3:49 PM	RankAssign			Aspen, Bart							
2/26/2016 3:49 PM	EmployeeAdd			Aspen, Bart							
2/26/2016 3:49 PM	EmployeeDelete			Aspen, Bart							
2/26/2016 3:35 PM	SettingEdit			Aspen, Bart							
2/26/2016 3:34 PM	PackageEdit			Aspen, Bart							
2/26/2016 3:34 PM	PackageEdit			Aspen, Bart							

For the How To using the History window, see [Reviewing Shift Bid History](#).



## Reports Window

The Reports window displays when you click the Reports tab. You use this window to review the reports you can click on to quickly compile data gathered from TeamWork. Click the Print tab to print the report.



For the How To using the Reports window, see [Running Reports](#).



# Chapter 3 – How To's for Shift Bids

## Overview

There are a number of tasks you perform to create and execute a shift bid. The following How To's guide you.

- [Adding Shift Bids](#)
- [Adding Groups to a Shift Bid](#)
- [Adding Lines to a Shift Bid](#)
- [Adding Employees to a Shift Bid](#)
- [Scheduling a Time Slot Shift Bid](#)
- [Entering a Message for the Shift Bid](#)
- [Changing the Status of a Shift Bid](#)
- [Modifying a Shift Bid](#)
- [Monitoring Employee Bids](#)
- [Manually Assigning a Shift to an Employee](#)
- [Performing Admin Functions in a Shift Bid](#)
- [Reviewing Shift Bid History](#)
- [Running Reports](#)
- [Deleting a Shift Bid](#)

## Adding Shift Bids

Use the Add New window to add new shift bids. Before you begin, you should take a few minutes to become familiar with the Settings window and the Tour Bidding terminology. See [Settings Window](#) and [Tour Bidding Definitions](#).

### To add shift bids:

1. Click on **Tour Bidding** on the top menu.  
Tour Bidding window displays.
2. Click on the **Bids** folder.  
Bids folders display for each bid status. Bids are filed according to their current status.
3. On the left navigation under Bids, click **Add**.  
The Add New window displays.  
**Note:** After you have added a shift bid, a Copy Data drop-down list allows you to select a shift bid you have already created. When you do so, it automatically copies groups, lines, and employees from in the shift bid you select.
4. Enter the **Name** of the shift bid.
5. Select the **Start** date.



6. Type the number of **Weeks**.
  7. Enter any **Notes**.
  8. Select Employee Options.
  9. Select Rank Calculator Method: Timestamp (first come, first served) or Criteria (below). If Criteria, select for 1st, 2nd, and 3rd. (You do not need to use them all.) If Timestamp, rankings do not apply.
  10. Select Bidding Options.
  11. Select Process Options.
  12. Click **Save**.  
Once you have created a shift bid, use the following procedures to set up and manage the bid.  
See:
    - [Adding Lines to a Shift Bid](#)
    - [Adding Employees to a Shift Bid](#)
    - [Scheduling a Time Slot Shift Bid](#)
    - [Entering a Message for the Shift Bid](#)
    - [Changing the Status of a Shift Bid](#)
- Remember:** The shift bid is in the Setup stage until you change the Status using the Status tab.  
See the [Status Window](#).

## Adding Groups to a Shift Bid

Use the Groups link to add Groups to a shift bid.

**Note:** For guidance in using this feature, contact ScheduleSource support.

### To add groups to a shift bid:

1. Open a shift bid.
2. Select **Groups**.  
The Groups window displays.
3. Select **Add**.  
Edit window displays.
4. Enter the **Rank** of the group.
5. Select the **Name** of the group.
6. Enter any **Notes**.
7. Select **Save**.  
Groups display in the Groups table.



## Adding Lines to a Shift Bid

After creating a shift bid, add lines to the bid.

### To add lines:

1. Open a shift bid.
2. Select the **Lines** tab.  
The Lines window displays.
3. Click **Add**.  
The Edit window displays.
4. Enter the **Name** of the line.
5. Enter the number of **Heads** needed for the line.
6. Enter the number of **Days** in the shift bid period.
7. Enter any **Notes**.
8. Select **Save**.  
Lines display in the Lines table.
9. Click the **Days** tab to enter specific shift information.  
Edit window displays.
10. Select the check boxes for the days.
11. Select the **Station**.
12. Select the start and end **Times**, as well as any break times and shift group information.
13. Select **Save**. Select **Close and Refresh Screen**.  
Line information displays in the Lines table.

## Adding Employees to a Shift Bid

After creating a shift bid and adding shifts, add employees to the bid.

### To add employees:

1. Open a shift bid.
2. Click the **Employees** tab.  
The Employees window displays.
3. Click **Add**.  
The Add Employees window displays.
4. Select **Agreement Type**.
5. Select **Employee Position**.
6. Select **Crew**.
7. Click **Load**.  
A list of employees displays.
8. Highlight the employees you want to add to the shift bid. Use Shift + Click to add multiple employees.



9. Click **Add**.  
The highlighted employees are transferred and listed in the Employees window.
10. To calculate ranks for the bid, click **Calculate Ranks**.  
The employees list is reordered according to the Rank Calculator setting in your shift bid.
11. Click **Save**.

## Scheduling a Time Slot Shift Bid

After creating a shift bid and adding lines and employees, you can schedule the time slots for when each employee can enter a bid. Remember, this shift bid is still in the setup stage and the Schedule tab only displays if this is a time slot bid. See the [Settings Window](#) and [Tour Bidding Definitions](#).

### To schedule a time slot shift bid:

1. Click the **Schedule** tab.  
The Schedule window displays.
2. Enter the **Slot Size**. The default is 6 minutes, i.e., 10 slots per hour.
3. Enter the **Start** and **End** dates and times. Click **Save**.  
The window updates and automatically displays another line with the next consecutive day so that you can quickly enter a large number of bidding windows during normal business hours. If you don't need these additional time periods, delete the entries.
4. Click **Update** and Assign Slots is highlighted and updates.
5. Enter a new date and time to reset the starting time slot. Click **Update**.  
The Schedule is updated and the employee with the first bidding time slot is identified.

## Entering a Message for the Shift Bid

Use the Messages windows to add a message for the shift bid. TeamWork provides a variety of message text options. For more information, see the [Messages Window](#).

**Note:** The employees' Home window displays the number of messages that are associated with a shift bid. As you add new messages, that number increments.

### To enter a message:

1. Open the shift bid.
2. Click the **Messages** tab.  
The messages window displays.
3. Click **Add**.  
A Message pop-up window displays.
4. Enter to and from **Effective** dates.
5. Type a **Title** and message **Text**. See the [Messages Window](#) for formatting options.
6. Click **Save**.



## Changing the Status of a Shift Bid

Use the Status window to change the status of a shift bid. You can also use this window to assign an employee to a shift if the shift bid is in an assign status and to reset bidding. See [Tour Bidding Stages](#).

### To change the status of a shift bid:

1. Open the shift bid.
2. Click the **Status** tab.  
The Status window displays.  
**Note:** The shift bid needs to be in the Setup stage for you to make changes to the settings, add shifts and employees, and add a schedule. You can add messages in any stage. However, to assign an employee to a shift, you need to change the status to Assign and then save the change.
3. Click the **Setup** stage to change settings, add shifts and employees, and add a schedule.
4. Make the necessary changes, and click **Save**.
5. To modify a shift bid, see [Modifying a Shift Bid](#).

### To use the Status window to assign shifts or clear and reset assignments:

1. Open the shift bid.
2. Click on the **Status** tab.  
The Status window displays.
3. Click the **Assign** button and then click **Save**.  
The Status window changes and there are now buttons to Assign and Reset.
4. To assign an employee, click **Assign**.
5. Enter the desired information and click **Submit**.
6. To reset bidding on a shift bid, click the **Reset** button.
7. Select the check boxes for the desired items.
8. Click **Submit**.

**Note:** Use the Status and Assignments windows to assign and reset or clear assignments. To manually assign a shift to an employee, see [Manually Assigning a Shift to an Employee](#).

## Modifying a Shift Bid

Modifying or editing a shift bid follows the same process as creating one. However, to make changes, you need to use the Status window and return the stage to Setup. Once the shift bid is in the Setup stage, you can make changes. When you are finished, you can return the shift bid to a preview, select, or assign stage.

### To modify a shift bid:

1. Open a shift bid.
2. Click the **Status** tab. See [Changing the Status of a Shift Bid](#).
3. Change the status to **Setup**.
4. Click **Save**.
5. Make the other changes you would like to make.



6. Click the **Status** tab.
7. Change the status and click **Save**.

## Monitoring Employee Bids

TeamWork allows you to monitor employee bids using several windows. They are the Assignments window and the Bid Sheet window. Each is explained as follows.

### To monitor employee bids using the Assignments window:

1. Open a shift bid.
2. Click the **Assignments** tab.  
The Assignments window displays.  
**Note:** The Assignments window shows when employees have gotten their choices in and shifts have been assigned. All of the choices and assignments of all employees in the shift bid display.

### To monitor employee bids using the Bid Sheet window:

1. Open a shift bid.
2. Click the **Bid Sheet** tab.  
The Bid Sheet window displays.
3. Select an Employee using the drop-down list.  
Bid Sheet information displays for that employee.

## Manually Assigning a Shift to an Employee

Use the Assignments or Bid Sheet windows to manually assign a shift to an employee. If configured, this allows you to consider special circumstances and accommodate employee needs outside of the rank-based bidding process. You can manually assign shifts to employees at any time, i.e., before the bidding process begins or after the bidding process is over.

### To manually assign a shift to an employee:

1. Open a shift bid.
2. Click the **Assignments** tab or the **Bid Sheet** tab.
3. Scroll down the list of employees or search for the desired employee.
4. Click on a choice if the employee has submitted bids.  
The Bid window displays.
5. Click **Assign Now**.
6. If the employee has not entered any choices, go to the **Assignments** tab and click on the **Shift** tab above the Bids and Assignments table.
7. Enter the employee name and click **Search**.
8. Click the **[Edit]** link under the Assigned column of the shift you want to assign to the employee.  
The Assign Employee(s) window displays.
9. Select the check box by the employee you want to assign and click **Assign**.  
The employee is assigned to the shift. To verify, go to the Bid Sheet window.  
Shift displays with a green background and assignment information displays.



## Performing Admin Functions in a Shift Bid

Use the Admin window to perform several administrative functions. They include:

- **Recalculate Lines** — Update the statistics for each line. Can be run to ensure statistics are calculated correctly and are current, but this is not necessary.
- **Assignment Processor** — Reset the processor. The Assignment Processor is TeamWork's work horse. It reviews bid choices and favorites, and assigns a shift.

### To perform Admin functions:

1. Click the **Admin** tab.  
The Admin window displays.
2. Click the button to execute the function.

## Reviewing Shift Bid History

Use the History window to review past TeamWork activity related to a shift bid. This may include reviewing a specific time period, actions, summary activity related to the bid, supervisor, or a specific employee.

### To review shift bid history:

1. Click the **History** tab.  
The History window displays recent activity.
2. Enter a **Timestamp** using the pop-up calendar and clock.
3. Enter an **Action** using the drop-down list.
4. Enter the name of a user or employee who performed the action in the **By** text box or leave blank.
5. Enter the name of an employee affected by the action in the **For** text box or leave blank.
6. Click **Apply**.

**Note:** The History window helps you document actions and those involved in employment disputes.

## Running Reports

Use the Reports window to generate and print reports on a variety of topics. They include:

- Set up
  - Employees
- Qualifications:
  - Qualifications
  - Employee Qualifications
  - Workgroup Qualifications
- Bidding
  - Bid Status
  - Employee Bids
  - Employee Awards
  - Unqualified Awards
  - Employee Training



- Charts
  - Bid Status
  - Assignments
  - [Activity]

View and print reports from the TeamWork window. In addition, when you select a report and click Export, you can export the report for use in other software applications. The following formats are supported:

- PDF
- CSV
- TAB
- XML

#### To run a report:

1. Open a shift bid.
2. Click the **Reports** tab.  
The Reports window displays.
3. Click on the report you want to view.
4. To print the report, click **Print**.
5. To save the report in another format, click the **Export** tab and save it in the format you choose from the drop-down list.

## Deleting a Shift Bid

Use the Settings window to delete a shift bid. If configured, first change the status of the shift bid to the Setup stage and Save. Then, you can delete the shift bid from the Settings window.

#### To delete a shift bid:

1. Open the shift bid.
2. Click the **Status** tab.
3. Change the stage to **Setup**.
4. Click the **Settings** tab.
5. Scroll down to the bottom of the window and click **Delete**.  
A prompt displays requesting that you verify the action: Delete this item?
6. Click **OK**.



# Chapter 4 – How To's for Template Bids

## Overview

There are a number of tasks you perform to create and execute a template bid. The following How To's guide you.

- [Adding Template Bids](#)
- [Adding Groups to a Template Bid](#)
- [Adding Lines to a Template Bid](#)
- [Adding Employees to a Template Bid](#)
- [Modifying a Template Bid](#)
- [Manually Assigning an Employee in a Template Bid](#)
- [Performing Admin Functions in a Template Bid](#)
- [Reviewing History in Template Bids](#)
- [Running Reports in a Template Bid](#)
- [Deleting a Template Bid](#)

## Adding Template Bids

Use the Add New window to add template bids. Create a template bid, gather employee preferences from shift bids, and quickly assign employees to lines in the template bid. Once you create one template bid, copy the lines, employees, and groups from one template bid to another template bid. See the [Settings Window](#), [Tour Bidding Definitions](#), and [How To's for Shift Bidding](#).

### To add a template bid:

1. Click on **Tour Bidding** on the top menu.  
Tour Bidding window displays.
2. Click on the **Templates** folder.  
Templates folders display for each bid status. Bids are filed according to their current status.
3. On the left navigation under Templates, click **Add**.  
The Add New window displays.  
**Note:** After you have added a template bid, a Copy Data drop-down list allows you to select a template bid you have already created. When you do so, it automatically copies groups, lines, and employees from in the template bid you select.
4. Enter the **Name** of the template bid.
5. Select the **Start** date.
6. Type the number of **Weeks**.
7. Enter any **Notes**.



8. Employee Options are not relevant. Template bids cannot be opened in the Employee portal.
9. Select **Rank Calculator** Method: Timestamp (first come, first served) or Criteria (below). If Criteria, select for 1st, 2nd, and 3rd. (You do not need to use them all.) If Timestamp, rankings do not apply.
10. Click **Save**.  
Once you have created a template bid, use the following procedures to assign employees and manage the bid. See:
  - [Adding Lines to a Template Bid](#)
  - [Adding Employees to a Template Bid](#)
  - [Changing the Status of a Template Bid](#)

**Remember:** The Template bid is in the Setup stage until you change the Status to Assign or Complete using the Status tab. See the [Status Window](#).

## Adding Groups to a Template Bid

Use the Groups link to add Groups to a template bid.

**Note:** For guidance in using this feature, contact ScheduleSource support.

### To add groups to a shift bid:

1. Open a template bid.
2. Select **Groups**.  
The Groups window displays.
3. Select **Add**.  
Edit window displays.
4. Enter the **Rank** of the group.
5. Select the **Name** of the group.
6. Enter any **Notes**.
7. Select **Save**.  
Groups display in the Groups table.

## Adding Lines to a Template Bid

After creating a template bid, add lines to the bid.

### To add lines:

1. Open a template bid.
2. Select the **Lines** tab.  
The Lines window displays.
3. Click **Add**.  
The Edit window displays.
4. Enter the **Name** of the line.
5. Enter the number of **Heads** needed for the line.
6. Enter the number of **Days** in the template bid period.



7. Enter any **Notes**.
8. Select **Save**.  
Lines display in the Lines table.
9. Click the **Days** tab to enter specific shift information.  
Edit window displays.
10. Select the check boxes for the days.
11. Select the **Station**.
12. Select the start and end **Times**, as well as any break times and shift group information.
13. Select **Save**. Select **Close and Refresh Screen**.  
Line information displays in the Lines table.

## Adding Employees to a Template Bid

After creating a template bid and adding lines, add employees to the bid.

### To add employees:

1. Open a template bid.
2. Click the **Employees** tab.  
The Employees window displays.
3. Click **Add**.  
The Add Employees window displays.
4. Select **Agreement Type**.
5. Select **Employee Position**.
6. Select **Crew**.
7. Click **Load**.  
A list of employees displays.
8. Highlight the employees you want to add to the template bid. Use Shift + Click to add multiple employees.
9. Click **Add**.  
The highlighted employees are transferred and listed in the Employees window.
10. To calculate ranks for the bid, click **Calculate Ranks**.  
The employees list is reordered according to the Rank Calculator setting in your template bid.
11. Click **Save**.



## Changing the Status of a Template Bid

Use the Status window to change the status of a template bid. You can also use this window to assign an employee to a shift if the shift bid is in an assign status and to reset bidding. See [Tour Bidding Stages](#).

### To change the status of a template bid:

1. Open the template bid.
2. Click the **Status** tab.  
The Status window displays.  
**Note:** The template bid needs to be in the Setup stage for you to make changes to the settings, and add lines and employees. When you want to assign an employee to a line, you need to change the status to Assign and then save that change.
3. Click the **Setup** stage to change settings and add shifts and employees.
4. Make the necessary changes, and click **Save**.
5. To modify a template bid, see [Modifying a Template Bid](#).

### To use the Status window to assign lines or clear and reset assignments:

1. Open the template bid.
2. Click on the **Status** tab.  
The Status window displays.
3. Click the **Assign** button and then click **Save**.  
The Status window changes and there are now buttons to Assign and Reset.
4. To assign an employee, click **Assign**.
5. Enter the desired information and click **Submit**.
6. To reset bidding on a template bid, click the **Reset** button.
7. Select the check boxes for the desired items.
8. Click **Submit**.  
**Note:** Use the Status and Assignments windows to assign and reset or clear assignments. To manually assign a line to an employee, see [Manually Assigning an Employee in a Template Bid](#).

## Modifying a Template Bid

Modifying or editing a template bid follows the same process as creating one. However, to make changes, you need to use the Status window and return the stage to Setup. Once the template bid is in the Setup stage, you can make changes. When you are finished, you can return the template bid to the assign stage.

### To modify a template bid:

1. Open a template bid.
2. Click the **Status** tab. See [Changing the Status of a Shift Bid](#).
3. Change the status to **Setup**.
4. Click **Save**.
5. Make the other changes you would like to make.
6. Click the **Status** tab.
7. Change the status and click **Save**.



## Manually Assigning an Employee in a Template Bid

Use the Assignments window to manually assign a lines to employees. The bid needs to be in the Assign stage.

### To manually assign an employee in a template bid:

1. Open a template bid.
2. Click the **Assignments** tab.
3. Click the **Line** tab.  
List of Lines display.
4. Click the **[Edit]** link under the Assigned column of the shift you want to assign to the employee.  
The Assign Employee(s) window displays.
5. Select the check box by the employee you want to assign and click **Assign**.  
The employee is assigned to the shift. To verify, go to the Bid Sheet window.  
Shift displays with a green background and assignment information displays.

## Performing Admin Functions in a Template Bid

Use the Admin window to perform several administrative functions. They include:

- **Recalculate Lines** — Update the statistics for each line. Can be run to ensure statistics are calculated correctly and are current, but this is not necessary.
- **Assignment Processor** — Reset the processor. The Assignment Processor is TeamWork's work horse. It reviews bid choices and favorites, and assigns a lines.

### To perform Admin functions:

1. Click the **Admin** tab.  
The Admin window displays.
2. Click the button to execute the function.

## Reviewing Employee Bids in Template Bids

TeamWork allows you to monitor employee bids using several windows. They are the Assignments window and the Bid Sheet window. Each is explained as follows.

### To monitor employee bids using the Assignments window:

1. Open a template bid.
2. Click the **Assignments** tab.  
The Assignments window displays.  
**Note:** The Assignments window shows assigned employees. When Choice = Mgr displays, it indicates you have made the line assignment. Ranks employee names display for each assignment.



**To monitor employee bids using the Bid Sheet window:**

1. Open a template bid.
2. Click the **Bid Sheet** tab.  
The Bid Sheet window displays.
3. Select an Employee using the drop-down list.  
Bid Sheet information displays for that employee.

## Reviewing History in Template Bids

Use the History window to review past TeamWork activity related to a template bid. This may include reviewing a specific time period, actions, summary activity related to the bid, supervisor, or a specific employee.

**To review template bid history:**

1. Click the **History** tab.  
The History window displays recent activity.
2. Enter a **Timestamp** using the pop-up calendar and clock.
3. Enter an **Action** using the drop-down list.
4. Enter the name of a user or employee who performed the action in the **By** text box or leave blank.
5. Enter the name of an employee affected by the action in the **For** text box or leave blank.
6. Click **Apply**.

**Note:** The History window helps you document actions and those involved in employment disputes.

## Running Reports

Use the Reports window to generate and print reports on a variety of topics. They include:

- Set up
  - Employees
- Qualifications:
  - Qualifications
  - Employee Qualifications
  - Workgroup Qualifications
- Bidding
  - Bid Status
  - Employee Bids
  - Employee Awards
  - Unqualified Awards
  - Employee Training
- Charts
  - Bid Status
  - Assignments
  - [Activity]



View and print reports from the TeamWork window. In addition, when you select a report and click Export, you can export the report for use in other software applications. The following formats are supported:

- PDF
- CSV
- TAB
- XML

**To run a report:**

1. Open a template bid.
2. Click the **Reports** tab.  
The Reports window displays.
3. Click on the report you want to view.
4. To print the report, click **Print**.
5. To save the report in another format, click the **Export** tab and save it in the format you choose from the drop-down list.

## Deleting a Template Bid

Use the Settings window to delete a template bid. If configured, first change the status of the template bid to the Setup stage and Save. Then, you can delete the template bid from the Settings window.

**To delete a template bid:**

1. Open the template bid.
2. Click the **Status** tab.
3. Change the stage to **Setup**.
4. Click the **Settings** tab.
5. Scroll down to the bottom of the window and click **Delete**.  
A prompt displays requesting that you verify the action: Delete this item?
6. Click **OK**.

