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Workforce Management Web for Supervisors (Classic) Help

Associating Agents with Rotating Patterns

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Contents

- [1 Available Agents Pane](#)
- [2 Distribution Pane](#)
- [3 Associating Agents with a Rotating Pattern](#)
 - [3.1 Review Validation Messages](#)







- Supervisor

Associate agents with the Rotating Patterns to assign consistent work weeks, days, hours, and/or activities.

Related documentation:

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The **Associated Agents** pane contains a list of agents who are associated with this Rotating pattern on the selected date starting from the Rotation Week. Use this pane (within the **Rotating Patterns** pane) to associate one or more agents with a selected pattern.

| | |
|--|--|
|  Save Now | Saves any changes made within the Associated Agents pane. |
|  Show Available Agents | Displays a list of available agents that you can associate with the Rotating Pattern. |
|  Help | Displays a Help topic that describes the Associated Agents pane. |
| Show Agents assigned to this rotating pattern on following date <i>field</i> | <p>The date that all agents in the list are actually assigned to the Rotating Pattern. Click in this field to display a calendar, from which you can select a date.</p> <p>Important Rotating Pattern assignment to the agent has an effective date, which is the start day when the Rotating Patterns becomes applicable to the agent. It is possible to assign multiple Rotating Patterns for the agent with the different start days.</p> <p>To assign Rotating Patterns to an agent, see Contracts & Rotating Patterns.</p> |
|  Search <i>field</i> | Enter search criteria. For example, agent's name or you can use the Search by radio buttons to filters the search criteria, by selecting either First name or Last name. |

The Associated Agents section has the following columns:




| | |
|---------------------|---|
| First Name | The agent's first name. |
| Last Name | The agent's last name. |
| Current Week | The current week of the rotation on the date specified by the date picker Show Agents assigned to this Rotating Pattern on |

| | |
|-----------------|-------------------------------|
| | following date. |
| Contract | The name of the Contract. |
| Team | The name of the agent's team. |

From the **Associated Agents** pane, you can open two other panes; the Available Agents pane and the Distribution pane, which are described below.


Available Agents Pane


This pane displays the following controls and fields:

| | |
|--|---|
|  Assign Agents | When clicked, associates agents with the Rotating Pattern. The agents are then displayed in the Associated Agents pane. |
|  Distribution | When clicked, displays the Distribution pane, in which more weeks can be added to the distribution of weeks for which the Rotating Patterns apply. |
| X Close | Closes the Available Agents pane. |
|  Help | Displays a Help topic that describes the Available Agents pane. |
| Effective Date <i>field</i> | The starting date on which the Rotating Pattern is assigned to the agent. Click the date field to display a calendar, from which you can choose a date or retain the default (current date). |
| Starting Week <i>field</i> | The starting week in which the Rotating Pattern starts for the agent. Select one of the existing weeks from the drop-down list. |
| Available Agents <i>list</i> | Lists the available agents that can be associated with Rotating Patterns. The columns in the list display the agents First name , Last name , the Rotating Pattern Name , Rotation Week , Contract , and Team name . Rotating Patterns and Contracts are displayed, based on the effective date that is selected. To view all of the columns in this list, scroll left-to-right or right-to-left, by placing your cursor in any one of the rows and use the right and left arrow keys to scroll to a column that is out of view. |






Distribution Pane

This pane displays the following fields and controls:

| | |
|---|--|
|  More | When clicked, adds an additional week to the Rotating Patterns distribution. |
|---|--|

| | |
|---|---|
| X Close | Closes the Distribution pane. |
|  Help | Displays a Help topic that describes the Distribution pane. |
| Distribution <i>list</i> | Displays the list of weeks, across which the Rotating Pattern is distributed. |

Associating Agents with a Rotating Pattern

1. Select **Policies > Rotating Patterns**.
2. In the **Objects** tree, select a site, for which you want to create a Rotating Pattern.
3. In the **Rotating Patterns** pane, select a Rotating Pattern in the list.
4. In the right-side pane, select **Associated Agents**.
The Associated Agents pane opens.
5. Click the **Show Available Agents**  .
The Available Agents pane opens.
6. In the **Effective Date** field, enter the date on which the Rotating Pattern becomes effective for the agent.
7. From the **Starting Week** drop-down list, select a starting week.
8. In the **Available Agents** list, select one or more agents.
You can also select the appropriate Search by radio button and enter an Agents first or last name in the search field.
9. To see the distribution of the Rotating Pattern across more weeks, select **Distribution**  .
The Distribution pane is displayed.
10. To add more weeks to the displayed list, click **More**  .
11. To close the **Distribution** pane, click **Close X**.
12. In the **Available Agents** pane, click the **Assign Agents**  .
The selected agents are displayed in the Associated Agents pane and are now associated with the selected Rotating Pattern and the starting week.
13. In the **Associated Agents** pane, click **Save Now**  .

Review Validation Messages

If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which includes a list of error and warning messages. For more information about these messages, see Review validation messages.