Workforce Management Web for Supervisors (Classic) Help

Contracts

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Use the Contracts views to create and manage contracts.

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Contracts settings are similar to employment contracts, in that they are used to configure settings for agent availability times and days off that might be union or contractual requirements. In the same way, WFM automatically takes the **Contract** settings into consideration to produce legal schedules for every agent.

At the top of the **Contracts List** pane, use the Site Settings pane to configure settings for the selected site, such as the minimum duration for start and end of working days, start times between consecutive working days, schedule planning period type, and planning period start date.

At the top of the **Constraints** pane, click each one of the following panes to configure additional properties and define scheduling parameters:

- Constraints—Defines the basic scheduling parameters for each contract, including constraints on working hours, working days, and the duration between working days.
- Availability Patterns—Defines the default settings for the days and hours that each contract can be scheduled.
- Day-Off and Weekend Rules—Defines the default settings for the days off per planning period, weekend rules, specified days off, and consecutive days off rules.
- Synchronization—Ensures that an agent starts each workday within a user-defined time threshold.
- Shifts—Displays a list of shifts that are assigned to the selected **Contract**.
- Agents—Displays a list of agents that are associated with the selected **Contract**.
- Profiles—Displays a list of profiles that are associated with the selected **Contract**.
- Advanced Hours—Displays the **Contract** minimum and maximum hours.

In the **Shifts**, **Agents**, and **Profile** views, use the following panes to further configure **Contracts**:

Shifts:

- **Available Shifts** pane—Used to set the state of the shift assignment (**Primary** or **Secondary**) and, from a list of available shifts, select one or more to assign to (or remove from) the selected **Contract**.

Agents:

- **Associate Agents** pane—Used to assign an effective date for the selected Contract and, from a list of available agents, select one or more to associate with the selected **Contract**.

Profiles:

- **Profile Properties** pane—Used to create a new Profile, add and delete skills to/from a **Profile**, and save any changes.

- **Associate Skills** pane—Used to assign a skills level and, from a list of available skills, select one or more to associate with a **Profile**.

Contracts List pane

Use the **Contracts List** pane to create new contracts or view, edit, delete, or copy existing contracts. Use the controls in the top-right corner of this pane to complete the following tasks:

- **Search** *field*—Enter the search criteria. For example, enter the name of the contract.

- **New**—Click this icon to create a new contract.

- **Delete**—Click this icon to delete and existing contract.

- **Copy**—Click this icon to copy and rename an existing contract.

- **Help**—Click this icon to view a Help topic about the Contracts pane.

- **Sort**—Click this icon to sort the Contracts list in ascending or descending order.

To open the list of existing contracts that are configured for the site you selected on the **Objects** pane:

1. Select **Policies > Contracts**.

2. In the **Objects** pane, select an existing site.
All available contracts for this site are displayed in a list in the Contracts pane.

Creating contracts

Link to video

To create a contract:

1. Select **Policies > Contracts**.

2. In the **Objects** pane, select the site for which you want to create a contract.

3. In the upper-right corner of the **Contracts** pane, click **New** .
   The Constraints pane opens.

4. By default, the **Name** field is already populated with a unique name when you select **New**. The name includes a number to ensure that each newly created contract has a unique name. You can change the name, but it must remain unique to prevent duplicate name errors from occurring.

Procedure continued...

1. In the **Constraints** pane, set the parameters in the **Properties** section, as required.

2. Continue to configure the additional contract properties, by selecting each tab at the top of the **Constraints** pane, as required.
   For detailed information about each pane, see Constraints, Availability Patterns, Days Off and Weekend Rules, Synchronization, Shifts, Agents, and Profiles.

3. To save the changes in each pane, click **Save** .

Deleting contracts

To delete a contract:

1. Select **Policies > Contracts**.

2. In the **Objects** pane, select the site from which you want to delete a contract.

3. In the **Contracts** pane, select the contract that you want to delete.

4. In the upper right corner of the pane, click **Delete** .

Copying contracts

To copy and paste an existing contract (to create a new one):

1. Select **Policies > Contracts**.

2. In the **Objects** pane, select the site from which you want to copy a contract.

3. From the **Contracts** list, select an existing contract.

4. In the upper right corner of the **Contracts** pane, select **Copy** .
   The **Copy Selected Contract** pane is displayed.

5. In the **Name** field, enter the name of the contract.

6. In the **Associate Copied Contract with the Following Site** section, select the site, to which you want to associate this contract.

> ### Important
> If a **Contract** is copied to a site with different planning period than the original site, all of the contract's planning-period-related values are reset to the default values.

7. In the upper right corner of the **Copy Contract** pane, click ⊞ **Save Now**.
   The contract is displayed in **Contracts** pane with the new name.

8. To configure the contract properties, select each tab at the top of the **Constraints** pane, as required.
   For detailed information about each pane, see Constraints, Availability Patterns, Days Off and Weekend Rules, Synchronization, Shifts, Agents, and Profiles.

9. To save the changes in each pane, click **Save** ⊞ .

Editing contracts

To edit an existing contract:

1. Select **Policies > Contracts**.

2. In the **Objects** pane, select the site in which you want to edit a contract.

3. In the **Contracts** pane, select the contract that you want to edit.
   The Constraints pane is displayed,

4. In the drop-down list, select each properties pane that you want to edit.

5. After editing the selected pane, click **Save** ⊞ .