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Workforce Management Web for Supervisors Help

Contracts List Pane

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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 <i>field</i>	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 an 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.

Viewing an Existing Contract

To view a 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 a Contract

Link to video

To create a new 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 is displayed.
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 in the Configuration

database. You can change this name, but it must remain unique to prevent duplicate name errors from occurring.

5. In the **Constraints** pane, set the parameters in the **Properties** section, as required.
6. 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](#).
7. To save the changes in each pane, click **Save** .

Deleting a Contract

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 a Contract

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 a Contract

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**  .