Workforce Management Web for Supervisors Help

Agent Contracts and Rotating Patterns

5/10/2025

Contents

Agent Contracts and Rotating Patterns

To view, add or delete the selected agent's assigned contracts or rotating patterns, select **Contracts & Rotating Patterns** at the top of the pane.

Use the controls in the top-right corner of this pane to complete the following tasks:

Add Contract or Rotating Pattern	Click to add a contract or rotating pattern for the selected agent.
Delete Contract or Rotating Pattern	Click to delete a contract or rotating pattern for the selected agent.
Save Now	Click to save any changes.
Help	Click to view a Help topic about the **Properties** pane.

> **Tip**
> If you do not have the Edit Contracts & Rotating Patterns privilege in the **Agents** view, the **Add/Delete Contracts** and **Add/Delete Rotating Patterns** icons are disabled.

This view is divided into two sections: Contracts and Rotating Patterns.

To configure contracts, see the Contracts topic in this Help file. To configure rotating patterns, see the Rotating Patterns topic.

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.

Contracts Section

The **Contracts and Rotating Patterns** pane displays a list of contracts and rotating patterns that are assigned to an agent, containing detailed information in two sections. The details for the assigned contracts are displayed in the following columns:

Name	The name of contract that is assigned to the selected agent (a sortable column).
Effective Date	A start date on which the assigned contract

	becomes effective for the agent. Agents can have multiple contracts assigned to them with different effective dates. All contracts that are assigned to an agent must have different effective dates. Therefore, on any specified day, the agent has only one effective contract. The effective date of assignment for the contract has daily granularity. • You can also assign contracts with an effective date to agents in the Agents pane. • You cannot specify a time of day that the effective date for contracts will begin.

In the **Contracts** pane, click **Add** to open another pane, in which you can add an effective date for the contract. Then, select the contract to assign from a list of available contracts, configured under the site in the Contracts pane.

Adding Contracts

To add a contract to the selected agent:

1. Double-click the **Effective Date** field to change the date or keep the current date (default).
2. In the **Contracts to be Assigned to Agents** list, click a **Contract** to assign or highlight it.
3. Click the arrow to assign the contract. The contract displays in the **Contracts** pane.
4. Click **X** to close the assignment pane.

Deleting Contracts

To delete a contract:

1. Select a contract.
2. Click **Delete** .
3. When the Confirmation dialog opens, click **Yes** to proceed or click **No** to cancel the deletion. **If you select Yes, you cannot undo the deletion of the contract.**

Rotating Patterns Section

The detailed for the assigned rotating patterns are displayed in the following columns:

Name	The name of rotating pattern that is assigned to the selected agent (a sortable column).
Effective Date	A start date on which the assigned rotating pattern becomes effective for the agent. The agent can have multiple rotating patterns assigned to him/her with different effective dates. All rotating patterns that are assigned to an agent must have different effective dates. Therefore, on any specified day, the agent has only one effective rotating pattern. The effective date of assignment for the rotating patterns has daily granularity. • You cannot specify a time of day that the effective date for rotating patterns will begin.
Starting Week	Specifies the weekly pattern that is configured in the rotating pattern that on the effective date the agent starts to work. (For example, Week 1, Week 2, Week 3.)

In the **Rotating Patterns** section, click **Add** ✚ to open another pane, in which you can add an effective date for the rotating pattern. Then, select a starting week, the rotating pattern to assign from a list of available rotating patterns, which are configured under the site in the Rotating Patterns pane.

Adding Rotating Patterns

To add and rotating pattern to the selected agent:

1. Double-click the **Effective Date** field to change the date or keep the current date (default).

2. In the **Starting Week** drop-down list, select the week that you want the rotating pattern assignment to begin.
   For example, Week 1, Week 2, Week 3, etc.

3. To distribute the rotating pattern across an increased number of weeks, at the top of the pane, click the
   Calendar 🗓 .
   The Distribution pane displays, containing a list of rotation weeks.

4. To increase the number of rotation weeks, click **More** ▤ .
   The number of rotation weeks in the list increases exponentially.

5. Click **X** to close the **Distribution** pane.

6. In the **Rotating Patterns to be Assigned to Agents** list, click a rotating pattern to assign by highlighting) it.

7. Click the arrow ↵ to assign the rotating pattern.
   The rotating pattern displays in the Rotating Patterns pane.

8. Click **X** to close the assignment pane.

Deleting Rotating Patterns

To delete a rotating pattern:

1. Select a rotating pattern.

2. Click **Delete** .

3. When the Confirmation dialog opens, click **Yes** to proceed or **No** to cancel the deletion.
   If you select Yes, you cannot undo the deletion of the rotating pattern.