Workforce Management Web for Supervisors Help

Contract Constraints

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Contract Constraints

The **Contract Constraints** pane defines the basic scheduling parameters for each contract. Use the **Constraints** pane when you create a new contract or when you edit an existing contract.

To view the **Constraints** pane for an existing contract:

1. Select **Policies > Contracts**.
2. Select an existing site in the **Objects** pane.
3. Highlight an existing contract in the existing **Contracts** list.
4. In the right-side pane, select **Constraints**.
5. After you have set the parameters in the Working Hours, Working Days, and Scheduling sections as required, in the upper right-hand corner, click **Save**.

Among other properties, you can set synchronization, which ensures that an agent starts each workday within a user-defined time threshold.

> ## Important
> You cannot create optimal schedules if you have not configured the constraints properly. Workforce Manager runs a consistency check to ensure that the minimum and maximum days off per week are compatible with the minimum and maximum days off per schedule planning period.

If you receive an error message when you are configuring **Contract** constraints, review the rules for each constraint (described in the **Working Hours** and **Working Days** tables below).

List of Contracts Retrieved in Segments

The list of **Contracts** is displayed in segments or sequential pages. When large amounts of data are being retrieved, the list of items in **Contracts** pane is displayed in smaller segments sequentially, with 50 items per page. This limits the number of items that are retrieved from WFM at any given time, maintaining optimal performance during retrieval. You can browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate button in the view. To navigate between pages, you can use the **Up**, **Down**, **Page Up**, and **Page Down** keys on the keyboard.

Contract Constraints Properties

Contract Name—The name of the **Contract**, which must be unique within the site.

Icon—The icon you want displayed for this Contract. Choose a background color that will make identification easy. Clicking the down arrow displays all available icons.

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

Working Hours section

Setting Name	Definition	Daily Valid Values	Weekly Valid Values	Schedule Planning Period Valid Values
Standard Paid Hours	The paid time, in hours and minutes, that agents assigned to this contract work in a standard day, week, and (if applicable) schedule planning period.	less than 24 hours	less than 168 hours can configure with a 1-minute time unit	less than 1008 hours (or fewer, depends on the planning period length) can configure with a 1-minute time unit
	Rules: • Should exclude overtime. • Values must be greater than or equal to the **Minimum Paid Hours** for the same period. • Values must be less than or equal to the **Maximum Paid Hours** for the same period.			
Minimum Paid Hours	The minimum paid time, in hours and minutes, that agents assigned to this contract are required to work per day, week, and (if applicable) schedule planning period according to contractual requirements.	less than 24 hours	less than 168 hours can configure with a 1-minute time unit	less than 1008 hours (or fewer, depends on the planning period length) can configure with a 1-minute time unit
	Rules: • The daily value must be more than 0.			

Setting Name	Definition	Daily Valid Values	Weekly Valid Values	Schedule Planning Period Valid Values
	• This value must be less than or equal to the **Standard Paid Hours** value for the same period. • The daily value x **Minimum Working Days per Week** must be less than or equal to the weekly value. • The daily value x **Minimum Working Days per Week** must be less than or equal to the Maximum Paid Hours (weekly). • If you are using a schedule planning period, the weekly value x the number of weeks in the schedule period must be equal to or less than the schedule planning period value. • If the period is a month, then the number of weeks is assumed to be equal to 4. • The weekly value divided by the **Maximum Daily Paid Hours** value must be less than or equal to the **Minimum Working Days per Week**. • The weekly value can be equal to 0 if **Minimum Working Days per Week** is equal to 0.			
Maximum Paid Hours	The maximum paid time, in hours and minutes, that agents assigned to this contract are required to work per day, week, and (if applicable) schedule planning period according to contractual requirements.	less than 24 hours	less than 168 hours can configure with a 1-minute time unit	less than 1008 hours (depends on the planning period length) can configure with a 1-minute time unit
	Rules • Includes all overtime and paid exceptions. • Must be greater than or equal to the **Standard Paid Hours** value for the same period. • The daily value x **Minimum Working Days per Week** must be equal to or greater than the **Weekly Minimum Paid Hours** value. • If you are using a schedule planning period, the weekly value x the number of weeks in the schedule planning period must be greater than or equal to the schedule planning period value. • If the period is a month, then the number of weeks is assumed to be equal to 5. • The weekly value must be equal to or greater than the **Daily Minimum Paid Hours** x **Minimum Working Days per Week** • The weekly value divided by **Daily Minimum Paid Hours** must be greater than or equal to the **Maximum Working Days per Week**.			

Setting Name	Definition	Daily Valid Values	Weekly Valid Values	Schedule Planning Period Valid Values
	• The weekly period must be greater than 0. • If the period is a month, it must be less than 31 x 24 hours.			

Working Days section

Setting Name	Definition	Daily Valid Values	Weekly Valid Values	Schedule Planning Period Valid Values
Maximum Consecutive Working Days	The maximum number of consecutive days that agents assigned to this contract type are allowed to work.	1–365 days	Not Applicable	Not Applicable
	Rules: • Must be equal to or greater than the **Minimum Working Days per Week**. • If **Maximum Working Days per Week** is less than 7, must be less than or equal to the **Maximum Working Days per Week** *x* 2. • This value can exceed the **Maximum Working days per Week** *x* 2 only when the **Maximum Working days per Week** is 7 and must be less than or equal to 365. • If agents have multiple assigned contracts, WFM uses the **Maximum Consecutive Workdays** setting from the contract on the first day of the schedule for the entire schedule. If the contract is assigned to the agent after the first day of the schedule and that contract's **Maximum Consecutive Working Days** setting has a different value, WFM ignores the that value.			
Minimum Consecutive Working Days	The minimum number of consecutive days that agents assigned to this contract type must work before a scheduled day off.	2–365 days	Not Applicable	Not Applicable
	Rules: • Effective only when value is set to 2 or more days. Any value below 2 is considered not specified. • Must be equal to or greater than the **Minimum Working Days per Week**. • If **Maximum Working Days per Week** is less than 7, must be less than or			

Setting Name	Definition	Daily Valid Values	Weekly Valid Values	Schedule Planning Period Valid Values
	equal to the **Maximum Working Days per Week** *x* 2. • This value can exceed the **Maximum Working days per Week** *x* 2 only when the **Maximum Working days per Week** is 7 and must be less than or equal to 365. • If agents have multiple assigned contracts, WFM uses the **Minimum Consecutive Workdays** setting from the contract on the first day of the schedule for the entire schedule. If the contract is assigned to the agent after the first day of the schedule and that contract's **Minimum Consecutive Working Days** setting has a different value, WFM ignores the that value. • WFM considers only days that have shifts or Granted work time ("overwrite" shift) as work days. Paid full-day exceptions and time-off are considered days off and are not counted as part of the **Minimum Consecutive Working Days**.			
Minimum Working Days per Week	The minimum number of days that agents assigned to this contract must work per week.	Not Applicable	0–7 days	Not Applicable
	Rules: • Must be less than or equal to the **Maximum Working Days per Week**. • This value *x* **Daily Minimum Paid Hours** must less than or equal to the **Weekly Maximum Paid Hours**. • This value must be less than or equal to the number of available days per week set on the **Availability Pattern** pane.			
Maximum Working Days per Week	The maximum number of days that agents assigned to this contract are allowed to work per week.	Not Applicable	0–7 days	Not Applicable
	Rules: • Must be greater than or equal to the **Minimum Working Days per Week**. • Must be less than or equal to the **Weekly Maximum Paid Hours** divided by **Daily Minimum Paid Hours**.			

Scheduling section

The Scheduling section in the **Constraints** pane has only one parameter. The **Schedule activity sets instead of task sequences** check box, sets the scheduling mode, based on site and contract configuration before scheduling. By default, this check box is not checked.

WFM uses the following algorithm to determine the scheduling mode:

- If task sequences do not exist at the site, contracts are scheduled in Activity Set mode.

- If task sequences exist at the site, contracts are scheduled in Task Sequence mode.

- If task sequences exist at the site and the **Schedule activity sets instead of task sequences** check box is checked in a particular contract, this contract is scheduled in Activity Set mode. In this case, any shifts that have mandatory task sequences are ignored (as if they were not assigned to this contract) and shifts that have optional task sequences are scheduled without task sequences.

Web for Supervisors Views in Previous Versions

If the WFM 8.5.2 back end deployed in your environment is a version earlier than 8.5.204, the **Constraints** pane will not include the **Scheduling** section with the **Schedule activity sets instead of task sequences** check box.

> ### Tip
> Some constraints are common for all contracts under a site. They are set in the Contracts > Site Settings pane in WFM Web.