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Workforce Management Web for Supervisors Help

Contract Agents

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Contract Agents

You use the **Agents** pane in the **Contracts** view when you [create a contract](#) or when you edit an existing contract.

To view the agents associated with an existing contract:

1. Select **Policies > Contracts**.
2. In the **Objects** pane, select a site
3. In the **Contracts** pane, select an existing contract
The **Constraints** pane displays by default.
4. In the right-side pane, select the **Agents**.
The Agents pane displays containing a list of agents that are associated with this contract on the selected date.

To change the date field in the **Agents** or **Available Agents** pane, click inside the field and a calendar is displayed. Select the date, as required. If you make changes that do not pass validation, the **Review Validation Messages** pane is displayed, which contains a list of error and warning messages. For more information about these messages, see [Review Validation Messages](#).

Use the **Contracts > Agents** pane to specify an effective start date for the selected contract and assign agents to the contract. You can also assign effective dates for contracts in the **Configuration > Agents > Contracts and Rotating Patterns** pane.

Contract Effective Dates

Contracts that are assigned to an agent have a start date that specifies when the assigned contract becomes effective. Agents can have multiple contracts with different start dates assigned to them, but all assigned contracts must have different start dates. In this way, an agent can have only one effective contract on any given day.

Important

You can specify an effective start date for an assigned contract that has daily granularity, but you cannot specify an effective start time.


Contract assignments might not always have an effective start date. If an effective start date is not specified, the contract is considered to be assigned to the agent from the *beginning of time*. The agent will have only one contract assigned from the *beginning of time*. All other assignments to that agent, must have specific effective start dates that are unique for each contract assigned.

If the agent does not have a contract assigned with no start date, it is assumed that the agent had no contract between the *beginning of time* and the earliest contract assignment.

There is no explicit end date for contract assignments. The agent has only one effective contract at the time, because an assigned contract ceases to be effective on the start date of another. The assigned contract with the latest effective start date is assumed to be effective until the *end of time*. This approach simplifies contract assignment and guarantees that contracts that are assigned to agents have no gaps in the effective intervals.



You can specify an effective start date for an assigned contract in **Contracts** on the **Agent** assignment tab, see the procedure below.

Associating an Agent With a Contract

1. In the **Contracts** pane, select a contract from the list of existing contracts.
2. Click **Show Available Agents** .
3. In the **Effective Date** field, enter the effective start date for this contact assignment.
4. Select one or more agents from the **Agents to be Associate with <contract name>** section.

Tip

Enter search criteria into the **Search** field and use the radio buttons to filter on **First** or **Last Name**, if the list of agents is long.

5. To associate the agent(s) with this contract, click **Apply** .
6. Close the **Available Agents** pane, and on the **Agents** pane, click **Save Changes** .

Agents—The agents that can be associated with this contract. All agents from the current site are listed.

Effective Date—The effective start date that is specified for this contract assignment.