Workforce Management Web for Supervisors (Classic) Help

Shifts

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Create and manage shifts that define basic workday parameters.

Related documentation:
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Shifts are defined by workday parameters, such as time of day, duration, and days of the week.

Create, copy, edit, and delete shifts by clicking **Policies > Shifts** and selecting the appropriate business unit and site on the **Objects** pane.

Managing shifts

You can create new shifts or copy existing ones and rename them. However, WFM limits the number of shifts you can create when building schedules.

Creating shifts

Link to video

To create a shift:

1. Go to **Policies > Shifts**.

2. In the **Objects** pane, select the **Business Unit** and then, the **Site**, in which you want to create the shift.

3. Click **New** .
   The new shift appears on the Shifts pane. with the default name.

4. Configure the shift properties.

> **Tip**
>
> The shift's default name includes a number to ensure that each shift 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.

Copying shifts

To copy an existing shift:

1. Select a shift.

2. Click **Copy** .
   The Copy Shift pane opens.

3. In the Name field, enter a name for the shift.
   The Copy to the same Site check box is checked, by default.

4. If you choose to uncheck the **Copy to the same Site** check box, select the **BU** and then, the **Site**, in which you want to create the shift (see the figure below).

Figure: Copy Shift

5. Click **Save Now** .
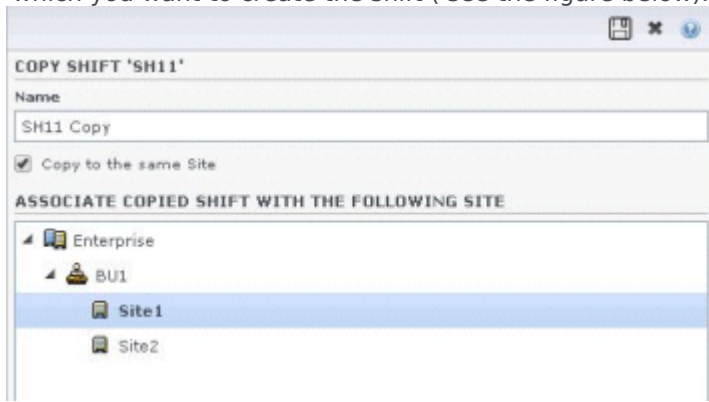   **The new shift appears on the Shifts pane under the selected Site.**

6. Change the shift properties, if necessary.

Use the following panes to configure the new shift:

- Shift Properties
- Shift Contracts
- Task Sequences
- Shift Sequences

Editing shifts

To edit a shift:

1. On the **Shifts** pane, select the shift you want to edit.

2. Make the necessary changes in each pane.

3. Click **Save Now** .

Deleting shifts

To delete a shift:

1. On the **Shifts** pane, select the shift you want to delete.

2. Click **Delete** .

Limitation on the number of shifts

The maximum number of shifts that can be configured when building schedules is 100 shifts.

Count all the agents configured for your schedule scenario, all their different contracts, and all the different shifts associated with those contracts. The total number of shifts cannot exceed 100. If it does, your build will fail, and WFM will display *Error 43: Too many shifts: the maximum number is 100, but more than 100 were requested*.

> **Tip**
> You can configure more than 100 shifts in your WFM database; the limitation is that you cannot associate more than 100 shifts with a single schedule.

Solving the problem of too many shifts

Managers in a contact center might configure a very large number of shifts because they believe that multiple shifts are the only way to create *fixed* schedules. However, rotating patterns can accommodate many different types of schedules, including both fixed and flexible schedules, using very few shifts. For example, you could create weekly rotating patterns to configure a fixed schedule that uses just one shift. For more information see Rotating Patterns.

Shift properties

Define the shift's general settings. Open this pane when you select a shift in the **Shifts** pane.

Name field

The name for this shift. Use names, such as First Shift, Swing Shift, or Second Shift, that identify the shift type. The name must be unique within the site.

Time and duration

- **Min. Paid Hours**—The minimum number of hours defined for this shift, entered in hh:mm format. All contracts assigned to the shift must be available to work at least this number of hours. Valid values are `00:01` to `23:45`. This value must be less than or equal to the **Maximum Daily Paid Hours** setting in the associated contract. Must include all paid breaks and meals.

- **Max. Paid Hours**—The maximum number of hours defined for this shift, entered in `hh:mm` format. Valid values are `00:01` to `23:45`. This value must be greater than or equal to the **Minimum Daily Paid Hours** setting in the associated contract. Must include all paid breaks and meals.

- **Earliest Start Time**—The earliest time that this shift can start. Some sites stagger shifts so that, for example, all third-shift agents arrive between 7:15 and 8:15. The earliest start time for this shift would then be 7:15.

- **Latest End Time**—The latest time that this shift can end. Shift agents can end their shift at staggered intervals that correspond to the stagger at the beginning of the shift. For example, a shift that starts between 7:15 and 8:15 can end between 3:15 and 4:15. The latest end time for this shift would then be 4:15.

- **Next Day**—When this check box is checked, indicates that this shift can end during the next day.

- **Start Step**—If using staggered start times for various agents working a shift, the **Start Step** is the increment of time between possible shift start times. **Scheduler** uses this **Start Step** to configure agent schedules. The start step can be any number of minutes between 1-120.

Important

The Earliest Start Time's last two digits must be either `:00` or an even multiple of the **Start Step** entry; otherwise, **Scheduler** disregards the Start Step entry and defaults to a **Start Step** of 15 min. For example: If you set an **Earliest Start Time** of 9:15 and a **Start Step** option of 30 minutes, the **Scheduler** disregards the **Start Step** entry (because 15 is neither equal to nor a multiple of 30), and starts shifts at 9:15, 9:30, 9:45, 10:00, and so on.

Optional time settings

Use the following optional time settings to narrow the range of time during which the start or end of the shift can be scheduled. You can create a fixed start or end time for the shift. For example, to set a fixed start time, set the **Latest Start Time** field to the same time as the **Earliest Start Time** field. The total shift duration then remains flexible.

Important

If you set fixed start and end times for your shift, the shift will be too inflexible to create optimal schedules.

- **Latest Start Time**—The latest time that this shift can start. Some sites stagger shifts so that, for

example, all third-shift agents arrive between 7:15 and 8:15. The latest start time for this shift would then be 8:15.

- **Earliest End Time**—The earliest time that this shift can end. Shift agents can end their shift at staggered intervals that correspond to the stagger at the beginning of the shift. For example, a shift that starts between 7:15 and 8:15 might end between 3:15 and 4:15. The earliest end time for this shift would then be 3:15.

Available days of the week

The days of the week for which this shift can be assigned by the scheduling algorithm. By default, all days are selected.

Distribution:

- **Min.**—The minimum number of occurrences of the shift for each agent whose contract is associated with the shift.

- **Max.**—The maximum number of occurrences of the shift for each agent whose contract is associated with the shift.

- **Applies To**—The period of time for which Scheduler should apply the distribution minimum and maximum.
    - **Disregard**—Distribution properties are not applied.
    - **Every Week**—The Min./Max. are considered on a weekly basis. Amounts entered should equal the numbers required for one week.
    - **Schedule Planning Period**—Distribution properties are applied to the schedule planning period. Distribution amounts entered should equal the numbers required for the entire schedule planning period.

Days-off rule

The rules that can be defined for the days off that are associated with the shift:

- **No Rule** means there are no rules about days off.
- There are three possible day-off rules:
    - **Next day**—If agents work this shift, they get the next day off.
    - **Previous day**—If agents work this shift, they get the previous day off.
    - **Next day is not off**—If agents work this shift, they cannot get the next day off.

Shift contracts

Open the **Shifts > Contracts** pane by clicking **Contracts** at the top of the **Shift Properties** pane.

> **Tip**
> Assigning contracts to a shift is optional. You can save a shift without associating it with a contract.

Assigning contracts to shifts

To assign a contract to a shift:

1. In the **Shifts** pane, select a shift.
2. In the right-side pane, select **Contracts**.
3. Click **Assign a Contract to a Shift** .
4. In the **Use This State for Assignments** drop-down list, select the appropriate state.
5. Select one or more contracts from the list on the **Contract Associations** pane. You can assign multiple contracts to a single shift.
6. Click **Apply** to move the selected contracts into the **Contracts** pane.
7. Click **Save Now** .

Removing contracts from shifts

To unassign or remove a contract from a shift:

1. In the right-side pane, select **Contracts**.
2. In the **Contracts** list, select the contract you want to remove.
3. Click **Remove Contract from Shift** .
4. When the **Confirmation** dialog appears, click **Yes**.

Changing the contract's state

To change the state of an assigned contract:

1. In the **Contracts** pane, use the **State** drop-down menu for the **Contract** you want to change and select **Primary** (default) or **Secondary**.
2. Click **Save Now** .

Tip

- Assigned contracts appear only in the **Contracts** pane.

- To select multiple contracts, hold down **SHIFT** or **CTRL** and click each additional contract.

- Each assigned contract has a state: **Primary** or **Secondary**. The default state after being moved is **Primary**.