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Workforce Management Web for Supervisors (Classic) Help

Shift synchronization

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- Supervisor

Configure shift synchronization and learn how it impacts schedule planning periods, contracts, team, and days off.

Related documentation:

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You opened this pane by selecting **Synchronization** in the right-side pane in the **Contracts** view. Enable the settings on the **Synchronization** pane by selecting the **Use Synchronization of Daily Schedules** check box.

Using synchronization ensures that an agent starts each workday within a user-defined time threshold.

Synchronization includes the **Shift Start Time Flexibility** option. This option allows the schedule start/end times to vary within a specified range. Allowing some flexibility enables you to create a more optimal schedule.

Synchronization and schedule planning periods

The synchronization setting and the schedule planning period affect how Workforce Management aligns agent start times:

- If the synchronization period is shorter, but fits exactly into the schedule planning period, synchronization will be complete. For example, if the synchronization period is two weeks and the schedule is six weeks, three synchronization periods exactly fit the schedule.
- If the synchronization period is shorter than the schedule planning period, only the time covered by the synchronization period will be synchronized. The rest of the schedule will not be synchronized. For example, if the synchronization period is four weeks and the schedule is six weeks, the first four weeks will be synchronized, but the final two weeks will not be.
- If the synchronization setting is longer than the schedule planning period, no synchronization will occur. For example, if synchronization is set to four weeks, but a schedule is built for three weeks, synchronization is disabled for the entire schedule.

Configuring synchronization

To configure and initiate synchronization:

1. Select the **Use Synchronization of Daily Schedules** check box, and then select either **Synchronize**

Shifts between Days Off, [X] Week(s) Period, or the **Schedule Planning Period** radio button.


Tip

If a **Contract** is copied to a site with different planning period than the original site, the **Use Synchronization of Daily Schedules** check box will be unchecked.

2. If you selected **[X] Week(s) Period**, enter the required number of weeks in the text box, or use the arrows to navigate to the correct number.
3. If necessary, change the **Shift Start Time Flexibility** settings:
 - For strict start time synchronization, leave **Shift Start Time Flexibility** set to the default 00:00.
 - To change **Shift Start Time Flexibility** settings, enter the number of minutes or hours by which the Scheduler can adjust the synchronized schedule, or highlight the hour or minute in the text box and use the arrows to adjust the selected time.
4. If necessary, change the **Synchronization Type** setting. Select one of these choices from the drop-down menu:
 - **Shift Start** (default)
 - **Shift Start and Duration**
 - **Shift Start, Duration, and Meals Status**
 - **Shift Start, Start of Meal, and Breaks**

Tip

Scheduler will attempt to synchronize by all parameters in your selection.

5. If necessary, change the **Applicable Days** setting. By default, all check boxes (**Sun, Mon, Tue, Wed, Thu, Fri, Sat**) are selected. To specify a day of the week to which synchronization does not apply, clear that day's check box. For example, to exclude the standard weekend, clear the check boxes for Saturday and Sunday.
6. To disable synchronization, clear the **Use Synchronization of Daily Schedules** check box.
7. To save the setting, click **Save** .

Synchronizing shifts for weeks or scheduling periods

If synchronization is different between two contracts, the synchronization is considered separately for each contract. Synchronization between contracts with identical configuration can continue to be used, even when contracts change. For example, shift start times can be synchronized for the entire week, even if the contract changes mid-week.

Contracts are considered to have identical synchronization constraint under the following conditions:

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- Contracts have the same synchronization period, week days, and start window.
 - Contracts have the same synchronization type (start, start + duration) and the same list of available shifts
 - Contracts have a simple configuration check that indicates that synchronization is possible.

A configuration check verifies that for the start time synchronization type, there are shifts that can start within the synchronization start time window.

In addition, the paid duration of shifts check box must be checked, for the start time and duration to synchronize, and the set of common shifts must be present in all contracts, for start, duration, and meal to synchronize.

Synchronizing shifts between days off

If synchronization is identical between contracts as in synchronization for weeks or scheduling periods, the contract change has no effect on synchronization. The Scheduler works as if only one contract is configured.

For non-identical synchronization configuration, synchronization does not extend outside of the contract date interval.

Synchronizing teams by contract

Before contract assignment changes, teams could easily be split into groups by contract. The groups were then synchronized as teams. When contract assignments include effective start dates, these contract groups might change during schedule scenarios. Therefore, team synchronization constraints are not longer applied to the entire scenario, but are split into smaller intervals so that agent contract assignments do not change.