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Workforce Management Web for Supervisors (Classic) Help

Historical Data

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- Supervisor

This topic lists the views in Historical Data. Configure settings to define how interaction volumes within historical data is displayed in the grid. Configure the settings to display for historical data in a line graph.

Related documentation:

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Tip

Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Building Volumes" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

The views in Historical Data are:

| | |
|--------------------------------|--|
| Historical Data Volumes | Displays Interaction Volumes and AHT for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator. |
| Historical Data Graphs | Displays your choice of statistics, using line charts and a table, for historical data that has either been imported into WFM or collected automatically by WFM Data Aggregator. |

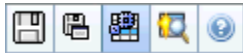
To open these views:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Historical Data**.
3. From the **Historical Data** menu on the toolbar, select Volumes or Graphs.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

Historical data volumes

Use the **Volumes** view to display interaction volumes within imported or collected historical data. This view provides standard date-selection controls and a grid that shows statistics for days or

timesteps. See the toolbar image here and the button descriptions below.



Displaying the view

To display the **Volumes** view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Historical Data**.
3. From the **Historical Data** menu on the toolbar, select **Volumes**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

Setting the display properties and date range

Use the following controls to customize the data display in the graph and table:

- **Period drop-down list**—Change the time range for the graph and the grid by selecting **Year**, **Month**, or **Week**. If you select **Week**, you can further adjust each row's time range by selecting **15**, **30**, or **60** (minutes) from the **Granularity** drop-down list.
- **Show Statistics drop-down list**—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**.
- **Show Columns check boxes**—Show (or hide) data columns in the table by selecting or clearing the **Volume**, **Volume %**, and **AHT** check boxes.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

Reading the data

The table provides columns that display the following statistics:

| | |
|------------------------|---|
| Week/Time Step | Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.) |
| [Days or Dates] | <p>If you select the Month date range, each group of columns shows statistics for one full day.</p> <p>If you select the Week date range, each group of columns indicates one date, the top row shows daily totals, and each lower row shows statistics for one timestep on that date.</p> <p>(Timestep durations depend on the granularity that you selected above.)</p> |
| IV | Shows the interaction volume forecast for each day |

| | |
|----------------------|---|
| | or timestep. |
| IV% | Shows this row's percentage of the day's total interaction volume. |
| AHT | Shows the average handling time. |
| Weekly Totals | If you select the Month date range, these columns show weekly totals, or averages, for the IV, IV%, and AHT statistics. |

Tip

You can copy and paste data between the grid and a spreadsheet. Before doing so, clear the **Volume %** checkbox so the **IV%** column is hidden.


Editing weekly totals

If you selected the period **Year** or **Month**, you can click inside the **Weekly Totals** cell and edit the value there. Daily values in the same row will automatically adjust their values so that the new **Weekly Total** is redistributed according to the original distribution of volume for each day of the week. This is useful if you have a week, in which you believe the volume will be increased, but you expect the volume to arrive at about the same rate as in your original forecast, day-over-day.


Calculation and saving options

You can use the following buttons on the toolbar (these commands also appear in the **Actions** menu):

| Icon | Name | Description |
|---|-------------------------|--|
|  | Save | <p>Save changes that you have made to the data.</p> <p>Save appears in the toolbar and in the Actions menu only if you have permission to edit historical data. To set that permission:</p> <ol style="list-style-type: none"> 1. In the Configuration module, select Roles > Role Privileges. 2. In the Forecast Role Privileges view, select Edit Historical Data check box. 3. Click Save. |
|  | Save As Template | <p>Opens the Save as Template Wizard, where you can save historical data as a forecast template.</p> |

| Icon | Name | Description |
|---|----------------------------------|--|
| | | When you save historical IV or AHT for a multi-site activity as a template, only multi-site activity data are saved, never the sum of underlying activities. |
|  | Use Multi-Site Activities | <p>Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a multi-site activity, Business Unit, or Enterprise in the Objects tree.</p> <p>If you set this button to On, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.</p> |

Opening the Find Events wizard

| Icon | Name | Description |
|---|--------------------|--|
|  | Find Events | Click this button (or select Find Events from the Actions menu) to search for special events in historical data, using the Find Events Wizard. |

Historical data graphs

Use the **Graphs** view to display historical data in a line chart. See the toolbar image and the button descriptions below.



Displaying the view

To display the **Graphs** view:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Historical Data**.
3. From the **Historical Data** menu on the toolbar, select **Graphs**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

Configuring the data display

Use these controls to configure the data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Week**, or **Day**.
Which options appear in the **Granularity** drop-down list depend on the value selected in the **Period** drop-down list.
- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**.
- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.


Reading the graph and legend

The graph shows the statistics, dates, period, and granularity that you selected. The vertical axis indicates the units shown.

The **Legend**, at the bottom, identifies the colors that the graph uses to represent particular statistics. The **Legend** changes depending on the statistics that you select.

Calculation and filtering options

You can use the following button on the **Actions** toolbar (this command also appears in the **Actions** menu):

| Icon | Name | Description |
|---|---------------------------|--|
|  | Use Multi-Site Activities | <p>Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a multi-site activity, Business Unit, or Enterprise in the Objects tree.</p> <p>If you set this button to On, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity.</p> |