Workforce Management Web for Supervisors (Classic) Help

Master Schedule State Group Totals

4/4/2026

Contents

Display coverage statistics for each timestep in a selected day to assist in determining the cause of schedule overstaffing or understaffing.

Related documentation:

In the **Master Schedule State Group Totals** view, see a toolbar similar to the one shown here and see the button descriptions below.

This view can help you to determine the cause of an overstaffing or understaffing during the day. For example: Although your site has 400 agents, a 3 PM traffic surge left you understaffed. How did it happen? Using this view, you can pinpoint the number of agents who are on breaks, in meetings, and otherwise not on duty, at 3 PM. You can use this information to justify adjustments such as moving agents' breaks or canceling a team meeting.

You can also compare **Calculated** and **Required Staffing**, and schedule coverage, with schedule-state-totals data. You can anticipate shrinkage and estimate how much of it (in the form of meetings and training, for example) can be assigned and stay within your forecast.

This view displays its data in a graph (upper portion of the view) and a table (lower portion), instead of on separate tabs. You can also specify that WFM display its data not only for days, but also for weeks and months. Both data displays show the differences between the **Schedule** and the **Forecast**, for each timestep during the selected time period. The **Graph** also shows totals as a flat line, because the lines representing forecasted and scheduled shrinkage can be of different shapes.

Displaying state group totals

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **State Group Totals**.
4. Select the objects from the Objects pane whose **State Group Totals** you want to display.
   You can select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.
5. Click **Get data**.
6. Select an item from the **Show Data For** drop-down menu to control what data is displayed in the grid:

- **Scheduled States Totals**—Display all schedule-state groups (and their data), of all types, but exclude shrinkage-related information. This is the default display.
- **Total Shrinkage**—Display all schedule-state groups (and their data), but exclude the type **none**.
- **Planned Overheads**—Display only schedule-state groups (and their data) with the type **planned overheads**.
- **Unplanned Overheads**—Display only schedule-state groups (and their data) with the type **unplanned overheads**.

Changing the default time zone for schedule state totals

When displaying schedule state totals, if you select agents from the several sites, WFM uses the business unit's time zone by default. If you select agents from only one site, WFM uses the site time zone by default. However, in the **State Group Totals** view, selecting **Show data for**, enables you change the default time zone by selecting a different one, by clicking the **Time Zone** drop-down list.

> Tip
>
> To see the **View Intra-Day Schedule** context menu in step 4 in the next two procedures, you must right-click a cell with a value other than `0`.

Selecting agents contributing to specific shrinkage

1. From the **Master Schedule** menu, select **State Group Totals**.
   The Show data for field is populated with Schedule States Totals by default (do not change it).
2. Select a business unit, site, and activities and click **Get Data**.
3. Right-click any cell that contains a value.
4. Click the **View Intra-Day Schedule** context menu.
   A list of agents who are contributing to the shrinkage is displayed.
5. Select the agents whose schedule you want to view.
6. Optionally, check the box **Open Intra-day schedule in a new window**, and click **OK**.
   This opens the Intra-Day view in a separate window, leaving the the Schedule State Totals view open behind it.
7. Or, leave the box **Open Intra-day schedule in a new window** unchecked, and click **OK**.
   This opens the Intra-Day view, replacing the Schedule State Totals view.

The Intra-Day view now shows the selected agents' schedules.

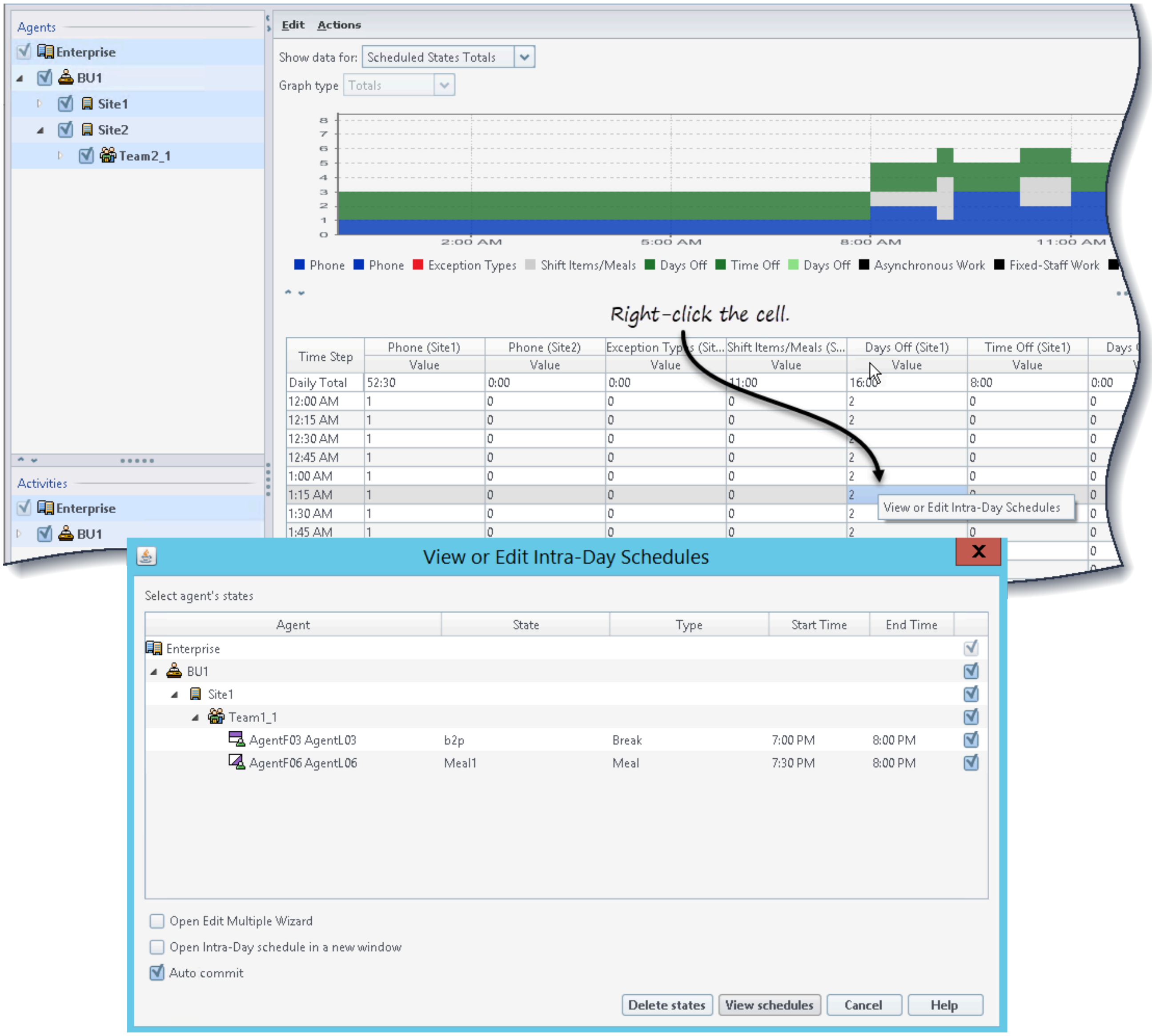
Viewing state group totals grouped by name

1. From the **Master Schedule** menu, select **State Group Totals**.
   The Show data for field is populated with Schedule States Totals by default (do not change it).
2. Select a business unit, site, and activities and click **Get Data**.
3. Click the **Group by names** check box.
   When this check box is selected, and there are Schedule State Groups with the same name under different sites, WFM displays their schedule state group totals in a single column with the same name.
4. Right-click any cell that contains a value.
5. Click the **View Intra-Day Schedule** context menu.
   A list of the agents is displayed.
6. Select the agents whose schedule you want to view.
   The Intra-Day view opens, replacing the Schedule State Totals view.

The Intra-Day view now shows the selected agents' schedules.

Viewing and editing agents' Intra-Day schedules

Use this procedure to view and edit multiple agents' schedules in the Intra-Day schedule or select multiple agents who are contributing to schedule shrinkage.



To view and edit agents' schedules:

1. In the data pane of an open scenario, select the time step or row for the schedule state you want to edit.
   The View or Edit Intra-Day Schedules Wizard opens with all agent states selected, by default.
2. Select/deselect agent states, as needed, and then:
   - Click **View schedules** to open the agents' Intra-Day schedule.
   - Click **Delete states** to delete the select agents' states.
   - Click **Cancel** to cancel the action and close the wizard.

Optionally, you can use the following check boxes:

- **Open Edit Multiple Wizard**—Opens the wizard and the Intra-Day schedule after you click **View schedules**. See the Edit Multiple Wizard.
- **Open Intra-Day schedule in a new window**—Opens the agents' Intra-Day schedule in a separate window after you click **View schedules**.
- **Auto commit**—Automatically commits the changes to the schedule. This box is checked, by default. Unchecking this box indicates that changes will be committed to the schedule manually.

> **Tip**
> When using the Edit Multiple Wizard, you cannot edit or delete the following state types: Activity, Day Off, Full-Day Exception, or Full-Day Time Off.

Graph controls

The **Graph** displays data for the object(s) selected in the Object pane. Use the controls in the Data pane to further configure the data display.

Graph Type *drop-down menu*	Select a display scheme for the graphical data. (This menu is disabled and reset to the default setting if the **Scheduled States Totals** value is selected in the **Show Data For:** drop-down menu).
Totals	Display the data in a line graph, that shows stacked schedule-state groups information. Default. If the **Show Coverage and Forecast Information** toolbar icon is toggled on, the graph displays this data, in separate lines: **Schedule Coverage**, **Forecasted Staffing Calculated**, and **Forecasted Staffing Required**.
Comparison	Display percentage data for a specific schedule-state group or for planned/unplanned overheads, in a line graph that compares it to forecast overheads data. The graph displays two percentage data series as lines, in the format that you select in the Targets drop-down menu. Tip If the **Show Coverage and Forecast Information** toolbar icon is toggled on, the graph displays two additional data series of forecast data for the object(s) that you selected on the Object pane.
Variance	Display a bar graph of positive or negative values for each timestep, if one of the following is selected in the **Object** area’s activity tree: a single-site activity, a single site, a single multi site activity, a single business unit.

Period	Select **Day**, **Week**, **Month**, or **Planning Period** to specify the granularity of the display.
Targets *drop-down menu*	This menu appears only when the **Graph Type** menu selection is Comparison; use it to select percentage data to compare. Select a format for comparing percentage data:
Total Planned	Display scheduled planned overheads totals data and forecasted total planned overhead data. Not available if the selected value in the **Show data for:** menu is **Unplanned Overheads**.
Total Unplanned	Display scheduled unplanned overheads totals data and forecasted total unplanned overhead data. Not available if the selected value in the **Show data for:** menu is **Planned Overheads**.
List of schedule-state groups	Display a line graph of data for the named **Schedule State Group**. Names in this list are followed by a site name if more than one site is selected on the Object pane. Important The **Schedule State Groups** list depends on the selection in **Show data for:** menu. If you selected **Planned Overheads** in the menu, then only planned **Schedule State Groups** are shown in the list. If you selected **Unplanned Overheads** in the menu then only unplanned **Schedule State Groups** are shown in the list.

Grid layout and controls

The columns in the **Master Schedule State Group Totals** table correspond to the configured schedule-state groups. Use the **Schedule States** tab in State Groups Filter to specify which columns appear in the table.

Grand Total	This column displays the grand total for all selected agents (not just for the visible schedule-state groups). It never contains subcolumn % (because its value is always 100%). Values in this column depend on the selection in the Show data for: menu.
Scheduled States Totals	This column displays the totals for visible schedule-state groups for the selected agents, regardless of their type.
Planned Overheads	This column displays the planned overheads total for all selected agents. It is hidden if Scheduled States Totals or Unplanned Overheads is selected in the Show data for: menu.
Unplanned Overheads	This column displays the unplanned overheads total for all selected agents. It is hidden if Scheduled States Totals Planned Overheads is

	selected in the Show data for: menu.

Important

- An additional row displays the daily total for each visible column.
- An agent who is in multiple schedule-state groups during an interval, is prorated in the grid by the fraction of the interval that the agent is in each state group. For example, an agent on break for 5 minutes and at work for 10 minutes might be listed in the Break cell as .33 and in the Work cell as .67 (Note that the terms *Break* and *Work* are used here as examples of schedule-state group names, and may not correspond to the schedule-state groups that are configured for your WFM environment.)
- The columns in the **Master Schedule State Group Totals** data table, and the stacked lines in the graph, corresponding to the configured schedule-state groups. Select **Filter**  in the toolbar, and use the **Schedule States** tab to specify which columns appear in the table and which lines appear in the graph.

Data controls

Show data for: *drop-down menu*	Select from the menu, a data-display scheme to apply to the grid: • **Scheduled States Totals**—Displays totals for the schedule-state groups of the currently selected agents, regardless of type. Select this option to disable the check boxes described below, and displays the data in grid columns that are selected in the **Schedule States** tab of the filter dialog. • **Total Shrinkage**—Displays the total shrinkage for the schedule-state groups (and their data), excluding the type none. • **Planned Overheads**—Displays the planned overheads total for all selected agents. Select to display the data in grid columns, grand total, and subcolumns that match the selected check boxes below. • **Unplanned Overheads**—Displays the unplanned overheads total for all selected agents. Select to display the data in grid columns, grand total, and subcolumns that match the selected check boxes below. Tip Each data-display scheme includes a **Time Step**

	column.
Value *check box*	Select this check box to display the column that shows coverage value in the grid. This check box is disabled but checked if you select **Scheduled States Totals** in the **Show data for:** menu.
Value % *check box*	Select this check box to display the column that shows coverage percentage in the grid. The percentage value is calculated relative to the grand total. This check box is disabled and not checked if you select **Scheduled States Totals** in the **Show data for:** menu.
Compare with forecast *check box*	Select this check box to display the column that shows percentage data of overhead from the forecast in the grid, shall be presented in grid. Enabled and applicable only if the same conditions are met as for the toggle action Show Coverage and Forecast Information. This check box is disabled and not checked if you select **Scheduled States Totals** in the **Show data for:** menu.

Actions menu and toolbar

These commands are available on the **Actions** toolbar (and on the **Actions** menu):

Icon	Name	Description
	**Cleanup**	Opens the Cleanup window. Enables you to delete **Master Schedule** information for selected dates and agents.
	**Show Coverage and Forecast Information**	This toggle controls if additional coverage and forecast information is displayed, and is enabled only if one of the following is selected in the **Object** area's **Activity** tree: a single-site activity, a single site, a single multi-site activity, a single business unit.
	**Use Multi-Site Activities**	This button becomes enabled when you select a multi-site activity or business unit in the Objects pane. Clicking this button displays combined data for all the activities included in the selected multi-site activity or business unit.

Icon	Name	Description
		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.
	**Filter**	Opens the State Groups Filter dialog box.
	**Options**	Opens the Options dialog box, where you can show or hide the columns **Total Planned** and **Total Unplanned** in the grid display; and change the colors that are used in **Coverage** and **Forecast** graphs.
	**Save As Template**	Saves the current selections as a forecast template of type **Overheads**. Click this icon (or select the command from the **Actions** menu) to display the New Forecast Template dialog box. Required settings: **Graph Type=Comparison**, **Period=Week**. Important The **Save as Template** command is not visible and the user cannot edit **Overheads** if he/she has no security rights to the **Forecast** module.

Options dialog

Use the **Options** dialog box to specify the columns that the **Master Schedule State Group Totals** view display.

1. Click **Options**  on the **Master Schedule State Group Totals** view's **Actions** toolbar.
   The Options dialog box opens. The Columns tab is selected by default.
2. Select the check boxes for the items that you want to be displayed.
3. Clear the check boxes for the items that you want to be excluded from the display.
4. Click the **Options** tab to display and modify the current **Coverage** and **Forecast Graph** color choices.
5. Click any of the color setting bars to open a color tool for that setting:
   - **Coverage Scheduled**

- **Forecast Staffing Calculated**
- **Forecast Staffing Required**

The color tool is described in the Configuration module topic.

6. Click **OK** to apply your choices.