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Workforce Management Web for Supervisors (Classic) Help

Overlays

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- Supervisor

Configure and manage forecast overlays that act as factors, helping you to track events that might affect interaction volumes.

Related documentation:

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Create and configure overlays in the **Forecast** module. For example, you might use an overlay to forecast the anticipated effect of a sales promotion or a marketing campaign.

See also *Overlays Primer* in the *Workforce Management Administrator's Guide*.

Getting started with overlays

Prerequisite: You must have the **Overlays** security permission before you can create or configure overlays or access **Find Events** in the **Historical Data Volumes** view. See the Forecast role privileges.

To use overlays, open the **Forecast** module and select **Overlays**. You'll see a hierarchy of business units (BUs), sites and overlays on the **Objects** pane.

Working in the Overlays list

Use toolbar icons or commands in the **Actions** menu to work with any overlays in the list:

1. Select a **BU** or **Site** on the **Object** pane.
A table in the Data pane lists all current overlays.
2. Click an overlay to select its entire row.
3. Select a command from the **Actions** menu, or an icon in the toolbar.

Controls and tab settings

The controls and tab settings are described in this topic.

Toolbar controls

-  **New**—Start the New Overlay wizard.
-  **Edit**—Edit the selected overlay.
-  **Delete**—Delete the selected overlay.

Data controls

The grid in the **Data** pane displays all overlays that belong to the selected BU or site. The grid contains these columns:

- **Overlay**—Name of the selected overlay.
- **Spread**—The time period over which the overlay is spread; in days or hours.
- **Type**—Possible values (Impacting or Redistributing) indicate how the selected overlay will affect forecast values. You can change this in the Properties tab by selecting a type:
 - **Calculate Using Specified Initial and Ending Impact** (select to specify Impacting)
 - **Always Use Entered Distribution** or **Always Calculate Disregarding Impacts and Distribution** (to specify Redistributing)
- **Usage**—For each overlay, this column lists the **Properties** tab choice for type (see above).

Properties tab

This tab contains the following settings:

- **Name** *field*—You can edit the selected **Overlay's** name in this field.
- **This overlay is** *label*:
 - **Impacting Forecast Values and Totals**—Specify that this overlay can impact the forecast by changing forecast's values and totals. This option is the default.
 - **Redistributing Forecast Without Changing Total**—Specify that this overlay must preserve a forecast's total for specific period even while changing the distribution of values inside that period.
- **Spread Over** *field*—Displays the length of time that the selected **Overlay** will occupy. Edit this field and select one of the two radio buttons **Days** or **Hours** to choose the units. The value must be greater than 0 (zero) and the default is set during creation.
- **While building forecast use this overlay in the following way** *radio buttons*:
 - **Calculate Using Specified Initial and Ending Impact**—Use the specified initial and ending impact when building a forecast. This option enables the Distribution tab and the fields Initial Impact and Ending Impact beneath that tab.
 - **Always Use Entered Distribution**—Use the specified (entered) distribution when building a forecast. This option enables the Distribution tab.
 - **Always Calculate Disregarding Impacts and Distribution**—Use this overlay, but always

disregard impacts and distribution when building a forecast. This option disables the Distribution tab.

- **This overlay is applicable to** *radio buttons*:
 - **IV**—Specify that this overlay applies only to Interaction Volume (IV).
 - **AHT**—Specify that this overlay applies only to Average Handling Time (AHT).

Distribution tab

This tab contains the following settings. What you see depends upon choices that you made on the **Properties** page:

- This page is completely disabled if **Always Calculate Disregarding Impacts and Distribution** was selected under the **Properties** tab.
- If **Always Use Entered Distribution** was selected on the **Properties** tab:
 - **Graph**—Displays the same information as the grid below it displays, but in graphical form.
 - **Grid**—Displays and allows you to edit the overlay's distribution. Columns:
 - **Daily or Hourly Impact**—Each row displays an increment during which the overlay will be in effect. The actual increment (day or hour) is configured in Spread.
 - **Distribution Value**—Displays the distribution value of each increment. The default value in each cell is 0.
 - If the selected overlay is of the type **impacting**, then you can enter values from -100 to 9999 into the grid.
 - If the selected overlay is of the type **redistributing**, then you can enter values from 0 to 100 into the grid.

Impacted Activities tab

(Also a page in the New Overlay Wizard.)

This tab lists all activities that correspond to the **Factor** that is selected in the **Object** tree.

- Select the check box to the left of each activity in the list, to specify which activities will be impacted by the selected factor.
- Clear the check box to specify no impact.

Events tab

The grid on this tab lists all **Events** in the selected **Overlay**, one per row. The value in every cell of this grid is editable. The columns are:

- **Name**—Edit the **Event** name in this cell.
- **Start Date**—Edit the start date.
- **Start Time**—Edit the start time.
- **Strength**—Edit the strength of the event. The range is any positive value (greater than zero), up to

nine digits and two decimals.

- **Disregard Historical Data**—Select this check box if the event should disregard historical data. Clear the check box to consider historical data.

Events controls

- **Add Event**—Click to add a new row to the grid, with default values in the cells.
- **Delete Event**—Click to delete the selected event from the grid.
- **Cancel** or **Save**—Click to perform those functions.

Creating forecast overlays

Use the **New Overlay Wizard** to create forecast overlays that act as factors, helping you to track events that might affect interaction volumes but first, watch the video.

[Link to video](#)

To create overlays:

1. Open the **Forecast** module and select **Overlays**.
2. In the **Objects** pane, select a **Business Unit** or **Site**.
3. Click **New**  or select **New** from the **Action** menu.
The New Overlay Wizard opens and displays the following pages, in order
 - Properties
 - Usage
 - Impact
 - Impacted Activities
4. Select the appropriate controls on each page, remembering that some selections may deselect others.

Overlays properties

When the **Properties** page opens:

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

- **Name** *field*—You can edit the selected **Overlay's** name in this field.
- **This Overlay shall** *radio buttons*:
 - **Impact Forecast Values and Totals**—Specify that this overlay can impact the forecast by

changing forecast's values and totals. This option is the default.

- **Redistribute Forecast Without Changing Total**—Specify that this overlay must preserve a forecast's total for specific period even while changing the distribution of values inside that period.
- **Spread Over** *field*—Displays the length of time that the selected **Overlay** will occupy. Edit this field and select one of the two radio buttons **Days** or **Hours** to choose the units. The value must be greater than 0 (zero) and the default is 1.
- **This Overlay is Applicable To** *radio buttons*—Select one of the two radio buttons **IV** or **AHT** to choose whether the overlay applies to Interaction Volume or Average Handling Time.

Defining usage

When the Usage page opens:

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

- **While Building A Forecast use This Overlay In The Following Way** *radio buttons*:
 - **Calculate Using The Specified Initial and Ending Impact**—Use the specified initial and ending impact when building a forecast. This option is the default. This option is missing from the display, and thus disabled if you selected **This Overlay Shall: / Redistribute Forecast Without Changing Total** (on the Properties page).
 - **Always Use Entered Distribution**—Use the specified (entered) distribution when building a forecast.
 - **Always Calculate Disregarding Impacts and Distribution**—Use this overlay, but always disregard impacts and distribution when building a forecast.

Setting the impact parameters

Tip

This page appears only if you selected the radio button **Calculate Using The Specified Initial and Ending Impact** on the Usage page.

When the **Impact** page opens:

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Next**.

The settings on this page are:

- **Impact parameters of overlay** *fields*:
 - **Initial Impact** *field*—Use this field to specify the initial impact of the overlay. Range: 0 (the default)

and positive numbers.

- **Ending Impact field**—Use this field to specify the ending impact of the overlay. Range: 0 (the default) and positive numbers. These fields are enabled only if the option **Calculate Using Specified Initial and Ending Impact** is selected.

Specifying impacted activities

When the **Impacted Activities** page opens:

1. Select the appropriate settings on this page, remembering that some selections may deselect others.
2. Click **Finish**.

This page contains the same controls and constraints as the Impacted Activities tab—a list of **Activities**, each with its own with check box.

The settings on this page are:

- Select the check box to the left of each activity in the list, to specify which activities will be impacted by the selected factor. You can also select a site's check box to automatically select all activities below it.
- Clear the check box to specify no impact.

Editing overlays

To edit an overlay:

1. Select **Overlay** in the module pane.
2. Select a **BU** or **Site** in the object area.
3. Select an overlay by one of these methods:
 - Select an overlay in the object area in the object area (beneath the selected **BU** or **Site**).
 - Select an overlay in the data area and click **Edit**  .
 - Double-click an overlay in the data area.
4. Select a command from the **Actions** menu, or an icon from the toolbar:
 - Edit **Overlay** controls:

Icon	Name	Description
	Save	Save all changes made to overlay.
	Calculate distribution	Start the Calculate Distribution Wizard, which calculates the distribution of the selected overlay. This action is enabled only if the option Always Use Entered

Icon	Name	Description
		Distribution is selected.

— OR —

- Select a tab:

Properties <i>tab</i>	View and change the main properties of the selected overlay.
Distribution <i>tab</i>	View and change the distribution method of the selected overlay. Enabled in the Properties tab by selecting the type Always Use Entered Distribution.
Impacted Activities <i>tab</i>	View and change activities which are impacted by the selected overlay.
Events <i>tab</i>	View and change events which are related to the selected overlay.

Calculating overlay distribution

Use the Calculate Distribution Wizard to define how WFM calculates the overlays distribution when building forecasts.

To calculate overlay distribution:

1. Open the **Forecast** module and select **Overlays** in the modules area.
2. Select an **Overlay** in the objects area.
Prerequisite: The Overlay property Always Use Entered Distribution must be selected.
3. Click **Calculate Distribution** () or select **Calculate Distribution** from the **Action** menu. The **Calculate Distribution Wizard** opens, and displays the following pages:

Select activities

On the **Activities** page:

1. Select one or more **Activities**.
2. Select or enter a **Start date** and an **End date** in the **Use Historical Data** area.
3. Optional: check **Use Overlap Templates** to enable the **Load Overlap Templates** page (see below).
4. Click **Next**.

Load overlap templates

On the **Load Overlap Templates** page:

1. Select the overlap templates to use when calculating distribution.

This page uses the same controls as Load Forecast Overlap Templates in the Volumes Build Wizard.

2. Click **Next**.

Select events

The **Select Events** page uses the same controls as the Select Events page in the **Volumes Build Wizard**, with some differences.

The grid at the top displays a list of events in the overlay, but only events which fall within the specified historical data date range. The grid has these columns:

- **Event**—The event's name.
- **Start Date-Time**—The event's start date and time.
- **Enabled**—Select this check box if the event should be considered for calculations.

Below the list are other controls:

1. Select the events (configured for the overlay) to be used when calculating distribution.
The controls for specifying impact that appear on the Select Events page in the Volumes Build Wizard) are not displayed if the selected event belongs to an overlay that has one of these options specified on the Properties tab
 - **Always Use Entered Distribution**
 - **Always Calculate Disregarding Impacts and Distribution.**
2. Click the **Distribution** button to display the **Distribution** dialog, which contains the same controls and presents the same data that appear on the Distribution tab.
The Distribution button is displayed if the selected event belongs to an overlay that has one of the Always Use Entered Distribution option specified on the Properties tab.
3. Make your selections from the **Distribution** tab controls.
4. Click **Finish**.