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Workforce Management Supervisor Help

12/28/2025

Table of Contents

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Related documentation:

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Getting started

Contents

Learn about the basic features in WFM before you begin making forecast predictions.

.

Related documentation:

-

Welcome to the Workforce Management (WFM) Supervisor Help. It provides a comprehensive guide to the features and functions of the latest WFM Supervisor Forecast interface. In addition, it offers some general guidance on using web browsers. If you require more assistance on using your web browser, refer to the browser's help system.

> **Tip**
> This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

Tour the latest WFM Forecast Interface

Link to video

Take a video tour of the features and controls of the latest WFM Forecast interface.

Site supervisors use a web browser to log in to WFM's Supervisor application and forecast staffing requirements, based on service objectives and historical data. See Logging in and out.

Security features

WFM Web includes security features that prevent unauthorized access to information. You can view and make changes only to those modules and objects (such as business units or sites) for which you have security access. You cannot access other modules or objects.

Using multiple browser windows

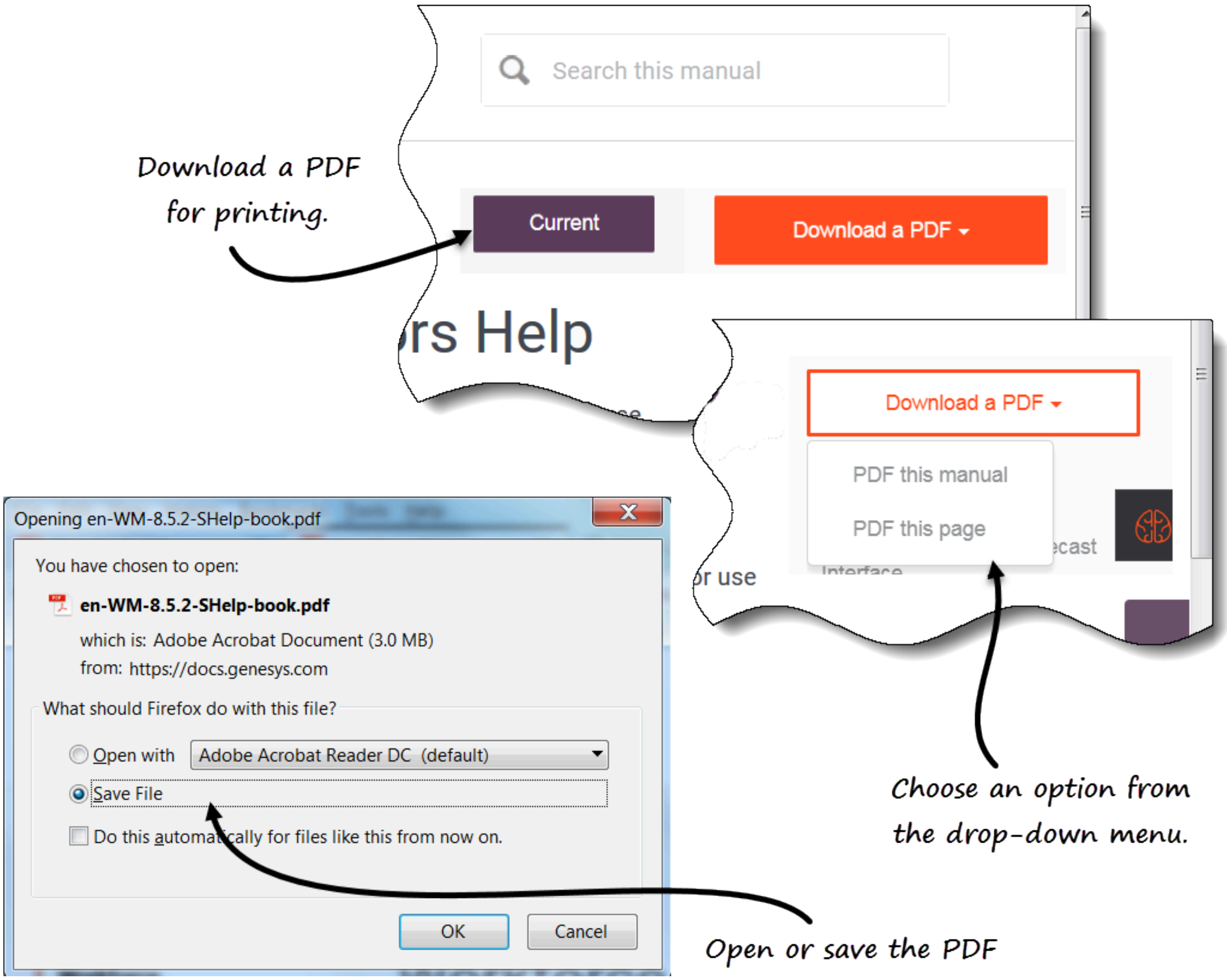
If you are using Mozilla Firefox, Genesys recommends that you not run WFM Web in more than one browser window on the same workstation, because doing so can cause the application to behave in unexpected ways.

Setting the clock

WFM Web for Supervisors picks up the regional settings or locale from the browser language settings. You may wish to change this if, for example, WFM Web appears in a 12-hour format and you want to view a 24-hour format.

Printing this online Help

If you prefer to print the Help rather than use it online, complete the following steps:



1. In the upper-right section of the page, click **Download a PDF**.
2. In the drop-down menu, select one of two options:
   - **PDF this manual**
   - **PDF this page**
3. When the dialog opens, select of the following:
   - **Open with** to select the application, with which you want to view and print the Help (Adobe Acrobat v9 is recommended).
   - **Save File** to save the Help to a folder on your computer.
4. When the download is complete, open and view the file on your computer offline, or navigate to the folder where you saved the .pdf file and use the **Print** function in your application to print the file.

Glossary of Terms

The terms and acronyms that are used throughout the WFM documentation appear as links that reference a glossary containing their definitions. You can view these definitions by clicking the link, which opens in a pop-up window on the page you are viewing. For example, Average_Handle_Time.

Also, see the entire Genesys Glossary.

Logging in and out

Contents

Learn how to log in and switch between the classic Supervisors UI and the latest Forecast UI, and what you can change in user settings.

Related documentation:

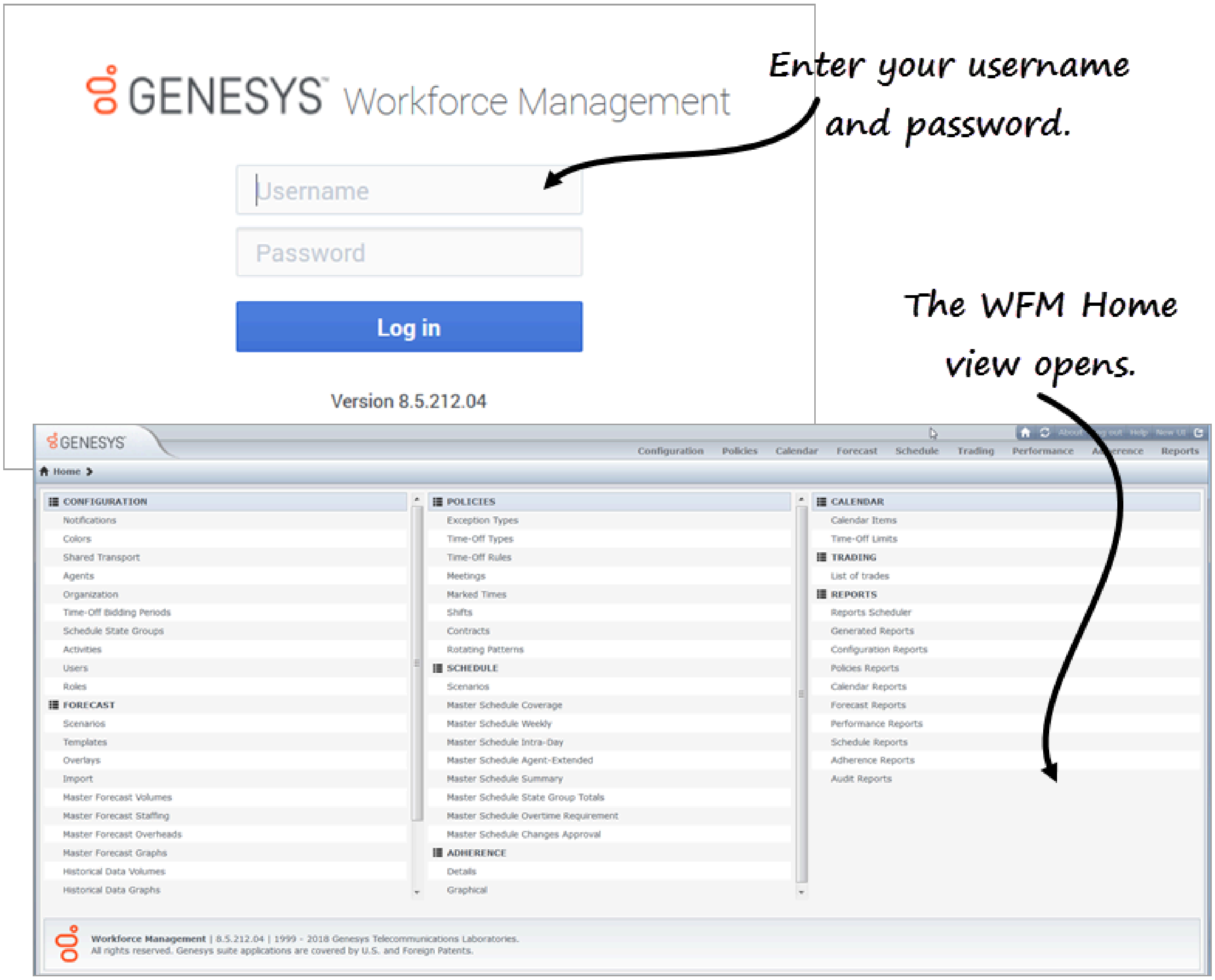
-

Tip

This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module. You can access the latest Supervisor UI that after logging in to Supervisors (Classic) UI if you have the appropriate access rights. See Opening the latest Forecast UI.

Before you can log in to WFM, you must have the WFM Web URL (address). In some contact centers, the Login page might be set up and ready for you to enter your username and password. If this is not the case, ask your administrator for the WFM Web URL. After typing it into your browser, WFM displays the splash screen for the Login user interface (UI).

Logging into WFM



Logging in

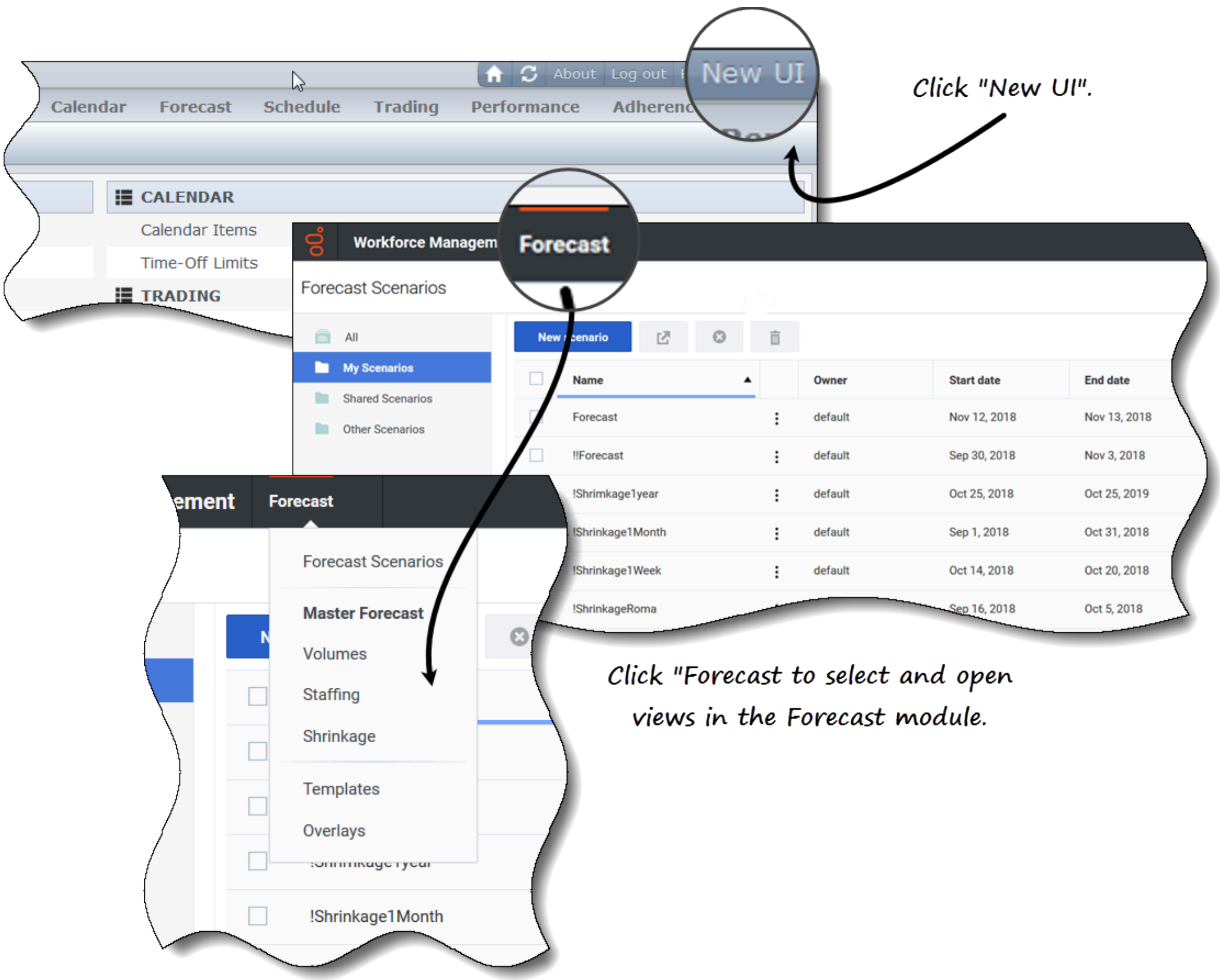
1. Obtain the URL (address) for the WFM application from your administrator.
2. Open a web browser.
3. Copy and paste or type the URL into your browser's address bar and press **Enter**.
   The Log in window appears.
4. Enter your user name and password.
5. Click **OK**.

If WFM Web validates your user name and password, the Supervisors (Classic) **Home** view opens. If WFM cannot log you in, it displays an error message indicating the problem. Either click **Log in** to try again (for example, if you think that you typed an incorrect user name or password), or click **Show error details**.

Important

When using the Firefox web browser, ensure that multiple supervisors are not logged in to the same host at the same time.

Opening the latest Forecast UI



Tip

If you do not see the option to open the latest Forecast UI and require access

> permission, contact your administrator.

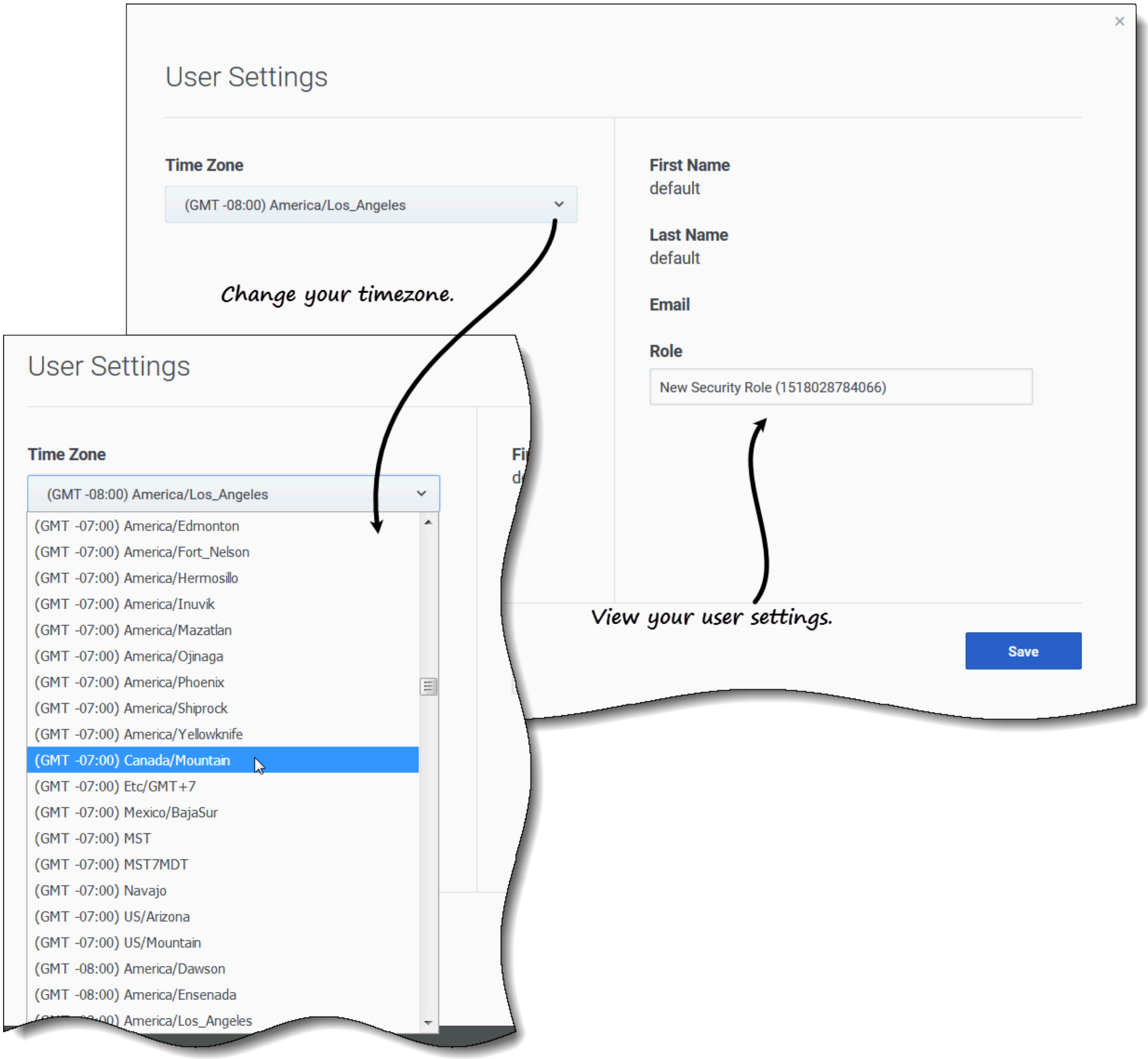
Opening the New UI

1. Log in to the WFM. See the procedure above.
2. In the top-right corner of the classic **Home** view (or any view), click **New UI**.
   The new Forecast view opens.
3. Click the **Forecast** drop-down menu to select and open any view.

Switching to the Classic UI

1. Click the **Log in**/**Log out** drop-down menu.
2. Select **Switch to classic UI**.

Setting the local timezone



WFM enables you to view your user settings and change your timezone in the **User Settings** dialog by clicking the **Log in**/**Log out** drop-down menu.

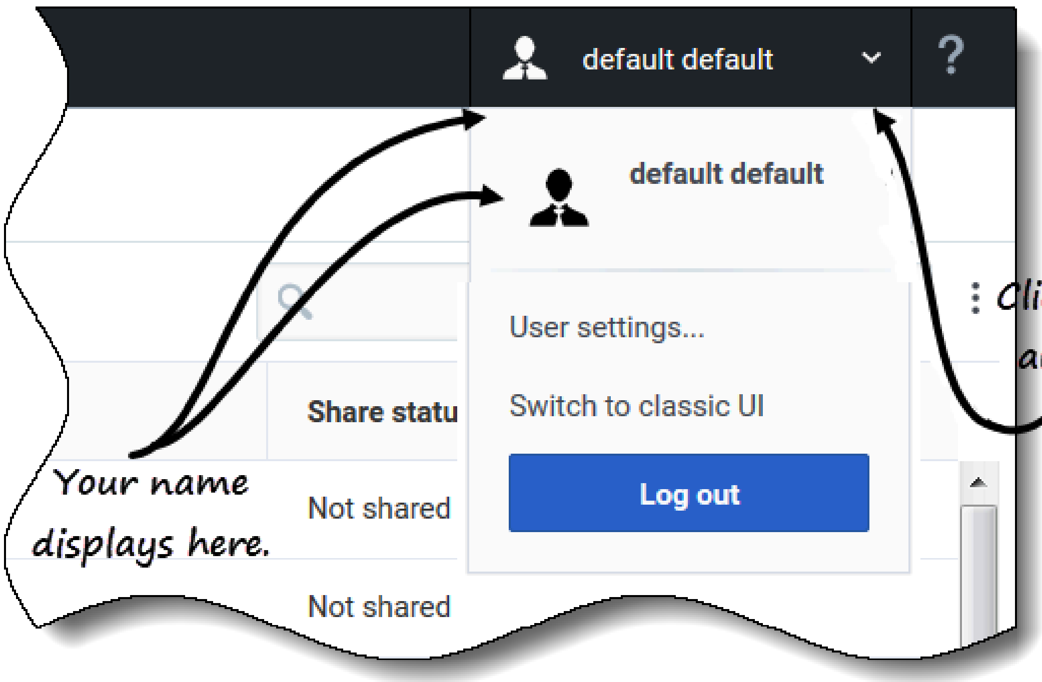
Setting your timezone

1. In the upper-right corner of any view, click the down arrow beside your username.
2. Select **User settings...**
   The User Settings dialog opens.
3. Click the **Time Zone** drop-down menu and select your timezone.

4. Click **Save**.

You can also view your first name, last name, email address, and WFM security role in this dialog, although you cannot change these settings.

Logging out of WFM



Always log out when you have finished using WFM. If you do not log out, other users of your workstation might be able to view your account information.

Logging out

1. Click the down arrow beside your name to open the drop-down menu.
2. Select **Log out**.
   WFM Web logs you out and the Login screen appears.

Another user can now log in or you can close the browser.

Common controls in the UI

Contents

Learn about the controls that are commonly used throughout the views in the WFM Supervisor application.

Related documentation:

-

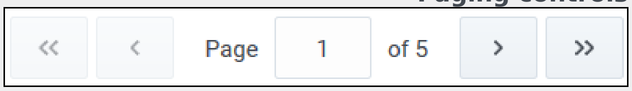
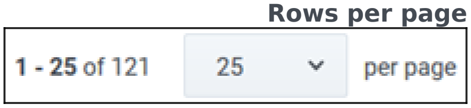
Tip

This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) and have landed on this page by accident, see the The Supervisor's window page in the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

The Supervisor interface

The views and panes in the WFM Supervisor interface display some combination of the controls described below, depending on selections that you make in the Objects pane.

Buttons and icons	The following buttons and icons appear at the WFM interface:
Log Out	Closes WFM Web without confirming your choice if there are no changes to save.
Actions menu	Enables you to select from a list of view-specific commands. This menu's contents change as you move among modules and views, and often match the command icons that appear on the toolbar.
Help	Opens WFM Web Help at the view-level topic. For example, if you open **Forecast** > **Scenarios** and click this icon, the Help topic opens, describing the **Scenarios** view.
Contextual Help	Opens WFM Web Help at the wizard or dialog topic. For example, if you click this button in a wizard or dialog, the Help topic opens, describing the wizard or dialog.
Search	Enables you to enter search criteria to quickly find the object you are looking for. The criteria you enter will depend on which pane you have open. Result that are found to match the search criteria are highlighted.
Sort	Enables you to sort lists to easily find the items you are looking for. The sorting criteria will vary,

	depending on which pane you have open.
 **Date selectors**	Enable you to change the date or date range in a view. See more below.
Paging controls 	Enable you to browse the previous and next pages or navigate to the first and last items in the data set (start and end of the list), by clicking the appropriate arrow button in the view. To navigate between pages, you can use the **Up**, **Down**, **Page Up**, and **Page Down** keys on the keyboard.
Rows per page 	Enable you to choose the number of table rows you want to see on a page. Use the drop-down menu to select 5, 25, 50, and 100 rows per page.
Menus and views	Click to open a drop-down menu of views in the WFM module: **Forecast**. The views include: • **Forecast Scenarios** • **Master Forecast** > **Volumes** • **Master Forecast** > **Staffing** • **Master Forecast** > **Shrinkage** • **Templates** • **Overlays** Click **Forecast Scenarios** to open this view and display a list of all scenarios. Click the drop-down list to select the following **Scenarios** views: • **Volumes** • **Staffing** • **Shrinkage**
Actions toolbar	the buttons on toolbar (often) correspond to commands Actions menu. Hover your mouse pointer over a button see tooltip that displays button's name. See an example.

Date selectors

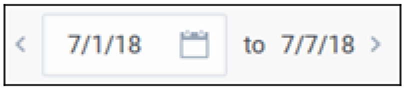
Many WFM Web modules and views have common date-selection controls to modify the date or date range displayed in them. Use these controls to:

- Select a start date.
- Jump to other dates by opening the monthly calendar.

Also, learn how WFM Web automatically selects the first workday in weekly views.

Selecting the start date

Where available, the date-selection controls appear at the right-most end of the toolbar.

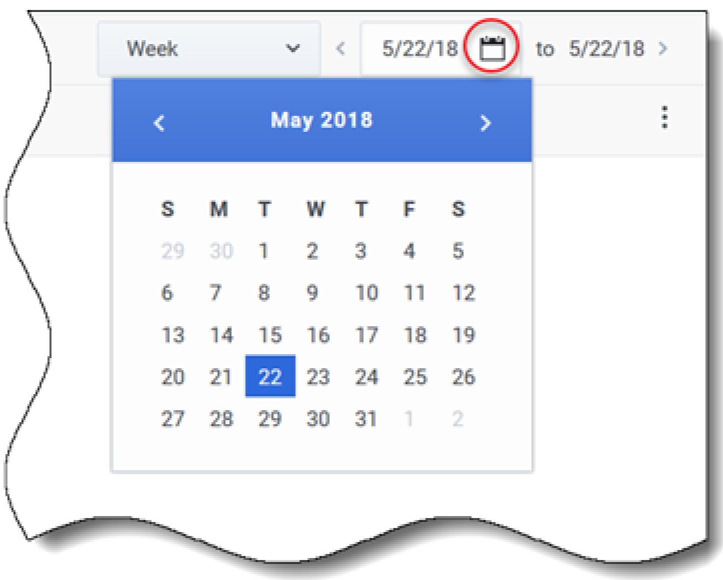


Use these controls as follows:

- Click the left angle bracket to move the start date back one interval (day, week, or schedule planning period—depending on the context), and the right angle bracket to move the start date forward one interval.
- Type a date into the date box or use the up and down arrows to edit the start date. (The sequence of the month, day, and year digits depend on your operating system's regional settings.) See also, weekly views.
- Click the Calendar icon to open the monthly calendar.

Date selection controls include the end date in views that display information for more than one day, but you cannot modify it.

Selecting the month



Clicking the Calendar icon opens the one-month calendar. You can use the calendar's controls to:

- Find the current start date—The currently-selected start date is indicated by a dark blue square.
- Select a new start date—Click a date to adjust the start date in the current module or view.
- Move forward or backward one month—Click the left or right arrows in the calendar header.

Weekly views: automatic start day selection

In weekly views, if you enter a date other than the first weekday, the view automatically adjusts and starts with the first weekday.

The first weekday is the one specified in **Week start day** in the **Business Units Properties** tab. See the *Workforce Management Web for Supervisors (Classic) Help*.

Forecasts

Contents

Find out what's in the Forecast menu and sub menus, and learn how to work with forecasts and historical data.

Related documentation:

-

Tip

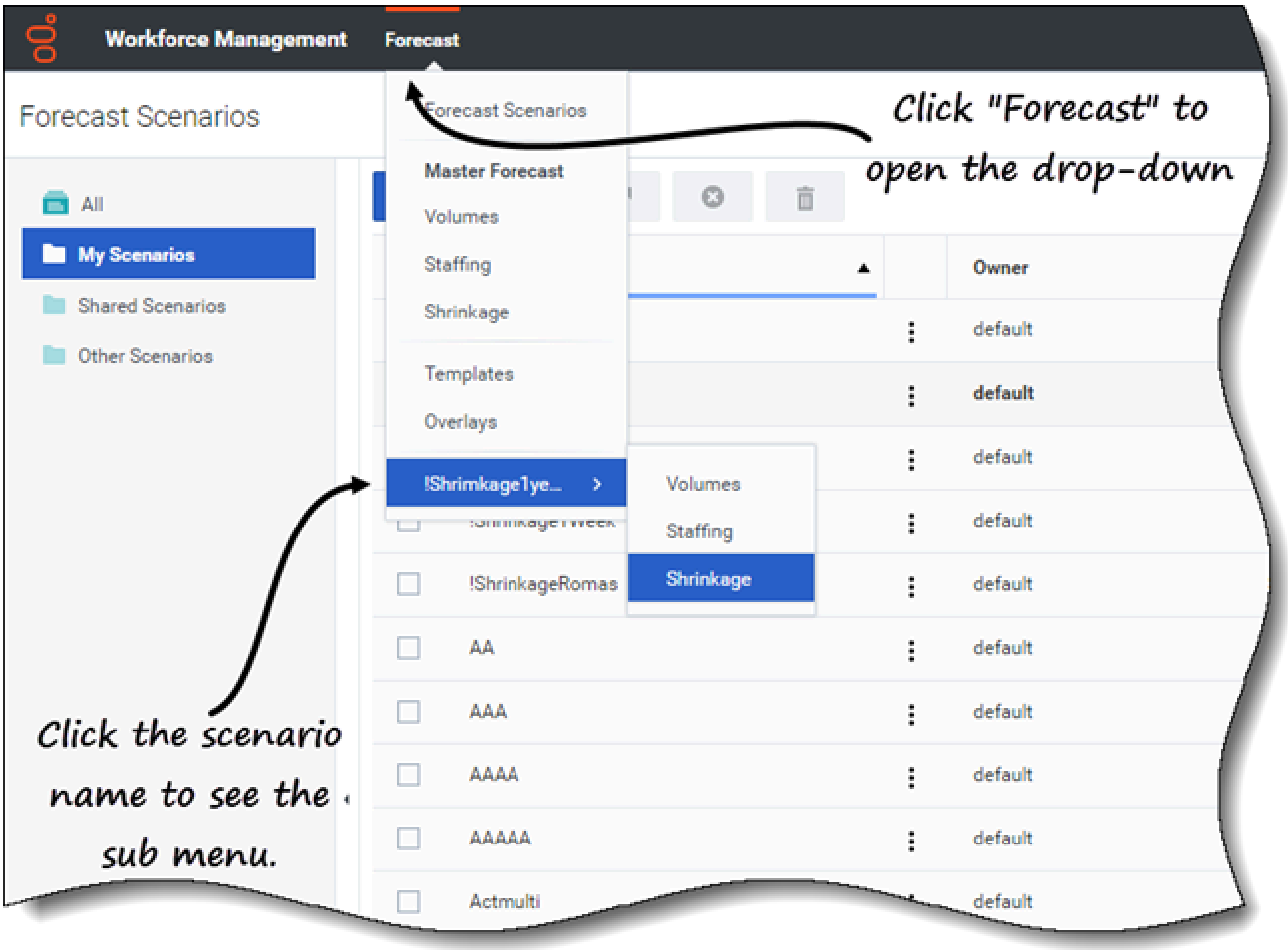
This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

In WFM, a *forecast* is a prediction of activity workloads for one or more sites, and consists of:

- Predicted customer-interaction volumes, which include information for phone calls, chat, email, outbound calling, back-office work, and so on.
- Predicted average handling time (AHT).
- Staffing (workforce) requirements based on service objectives.

WFM uses these predictions to build optimal schedules for real agents, or for a generic staff of profiles based on those agents. For links to important forecast help topics, see Working with forecasts.

Navigating the Forecast views



The **Forecast** module includes the following views:

Scenarios—Click to open this view and display a list of existing scenarios. Open a scenario to see the following views with data displayed in graph and table formats:

- Volumes—Click to open the **Scenario Volumes** view.
- Staffing—Click to open the **Scenario Staffing** view.
- Shrinkage—Click to open the **Scenario Shrinkage** view.

Master Forecast—If you have access rights, open the following views to see data displayed in graph and table formats:

- Volumes—Click to open the **Master Forecast Volumes** view.
- Staffing—Click to open the **Master Forecast Staffing** view.
- Shrinkage—Click to open the **Master Forecast Shrinkage** view.

Overlays—Click to open this view and display a list of existing overlays.

Templates—Click to open this view and display a list of existing templates.

If you have open scenarios and you click **Forecast** > **Scenarios** to navigate back to the list view, you can click **Forecast** again and see open scenarios at the bottom of the drop-down list. Click the scenario name to display a sub menu containing the 3 scenario views: **Volumes**, **Staffing**, and **Shrinkage**. Click any view in the sub menu to open it.

> **Tip**
>
> If you do not have access permission for the new Forecast module or other views within the module, you will see the message *Page Not Found. You don't have permission to view this page* when trying to access it. If required, ask your Administrator to grant you access permission.

Reviewing terminology

To better understand WFM forecasting and scheduling views and dialog boxes, it is helpful to review certain WFM terminology. Click these terms to open the definition in the glossary: Activity, Multi-Site Activity, Site, and Business Unit.

For more information about these objects, see the *Workforce Management Web for Supervisors Help (Classic)*.

Working with forecasts

Here's an overview of the tasks involved in creating and publishing forecasts:

1. The first step in creating a new forecast is to create a forecast scenario for one or more activities using the New Scenario wizard. The wizard dialog enables you to create scenarios with no forecast numbers (to be supplied later).
2. If you created a scenario with no forecast numbers, open the Scenario Volumes view and use the Build Volumes wizard to build interaction volume and AHT forecasts for each activity. You can use various methods to build volume, including entering values, using historical data or templates.
3. Next, open the Scenario Staffing view and build a staffing forecast for each activity.
4. After you create and evaluate your scenarios, publish the best scenario to the Workforce Management database. This scenario then becomes the Master Forecast. WFM Web builds schedules based on the data in the Master Forecast.

How do you choose the *best* scenario? The best scenario is the one that comes closest to predicting volumes, AHT, and staffing requirements for a given time-period, based on your contact center’s service level objectives.

Using historical data in forecasts

In most cases, forecasts are based on historical data.

- If historical data for interaction volumes and average handling time (AHT) has been imported, you can create both interaction-volume forecasts and AHT forecasts simultaneously.
- If historical data exists for interaction volume but not for AHT, first create the interaction-volume forecast using any of the forecasting methods. Then create the AHT forecast using a template.
- If historical data exists for AHT but not for interaction volume, first create the interaction-volume forecast using templates. Then create the AHT forecast using any of the forecasting methods.

Scenarios

Contents

Learn how to perform all of the basic tasks to help you manage forecast scenarios.

Related documentation:

-

Tip

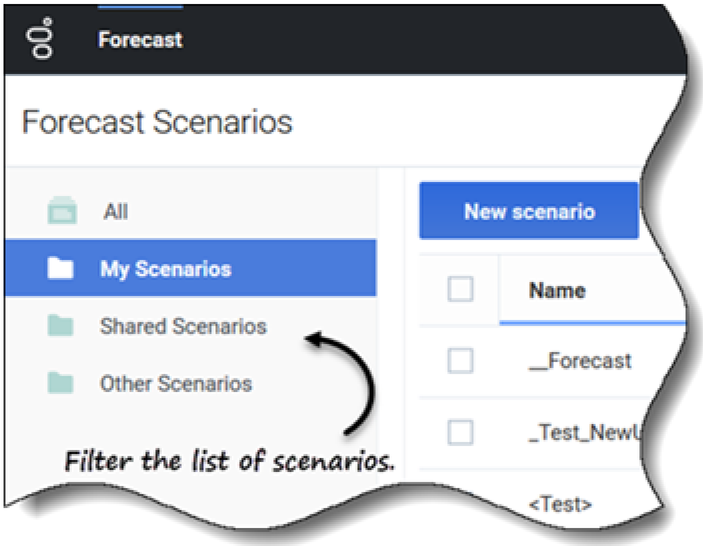
This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

A *forecast scenario* is a prediction of activity workloads for one or more sites. You might create many scenarios before defining the optimal one that will be used as the Master Forecast.

Open this view by selecting **Forecast** > **Scenarios** in the navigation bar. Now you can:

- View a list of forecast scenarios, including the owner's name, start and end dates, comments, and shared status.
- Filter the list of scenarios.
- Use the Actions menu and toolbar to complete other tasks.

Working in the Scenarios view



The **Scenarios** view displays scenarios in a table format that you can filter by selecting:

- **All**—Displays all scenarios.
- **My Scenarios**—Displays only the scenarios you have created. This view opens by default when you select the **Scenarios** view.
- **Shared Scenarios**—Displays only the shared scenarios created by other users.
- **Other Scenarios**—Displays only the unshared scenarios created by other users .This folder is only accessible to users that have the appropriate privileges.

If there are no scenarios in any one of these views, you'll see this message in the middle of the scenarios pane: *There are no forecast scenarios to display.* If there are no scenarios in the **My Scenarios** view, you'll see this message: *You do not have any forecast scenarios* together with the **New scenario** button. Click this button to create a scenario, if desired.

Restrictions: Viewing and deleting forecast scenarios

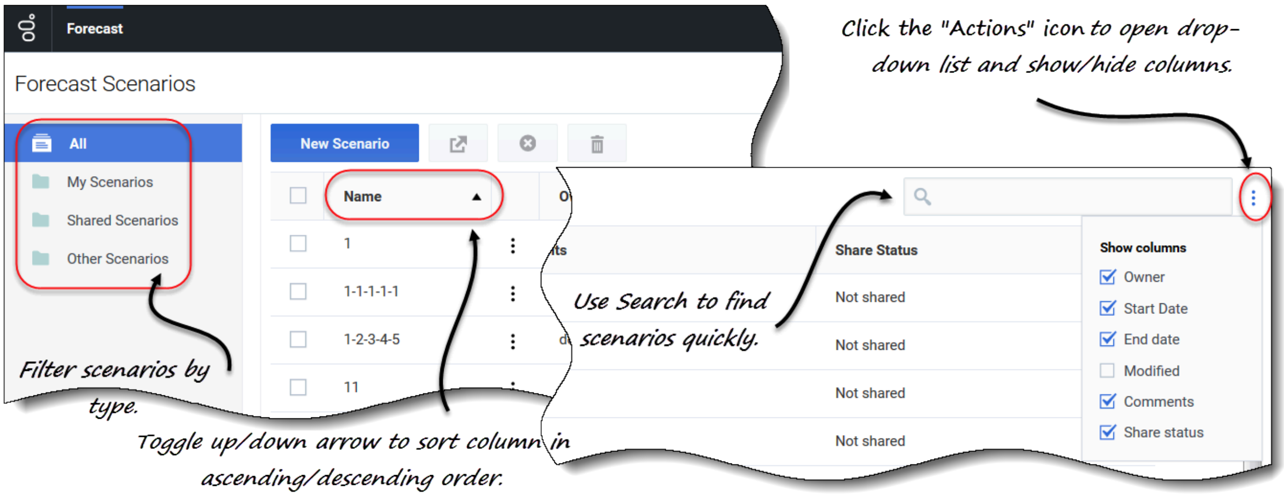
Some restrictions apply when viewing or deleting forecast scenarios. Users must have access permission to:

- At least one activity or multi-site activity in the forecast scenario to see it.
- All activities and multi-site activities in the forecast scenario to delete it.

Contact center administrators determine the level of access to multi-site activities in Forecast Scenarios, as described above. If you cannot access activities or multi-site activities in scenarios, contact your administrator for assistance.

Finding scenarios quickly

To quickly find a scenario in the table, click the up/down arrow in the **Name** column to toggle the list in ascending or descending order, or enter the name into the **Search** field.

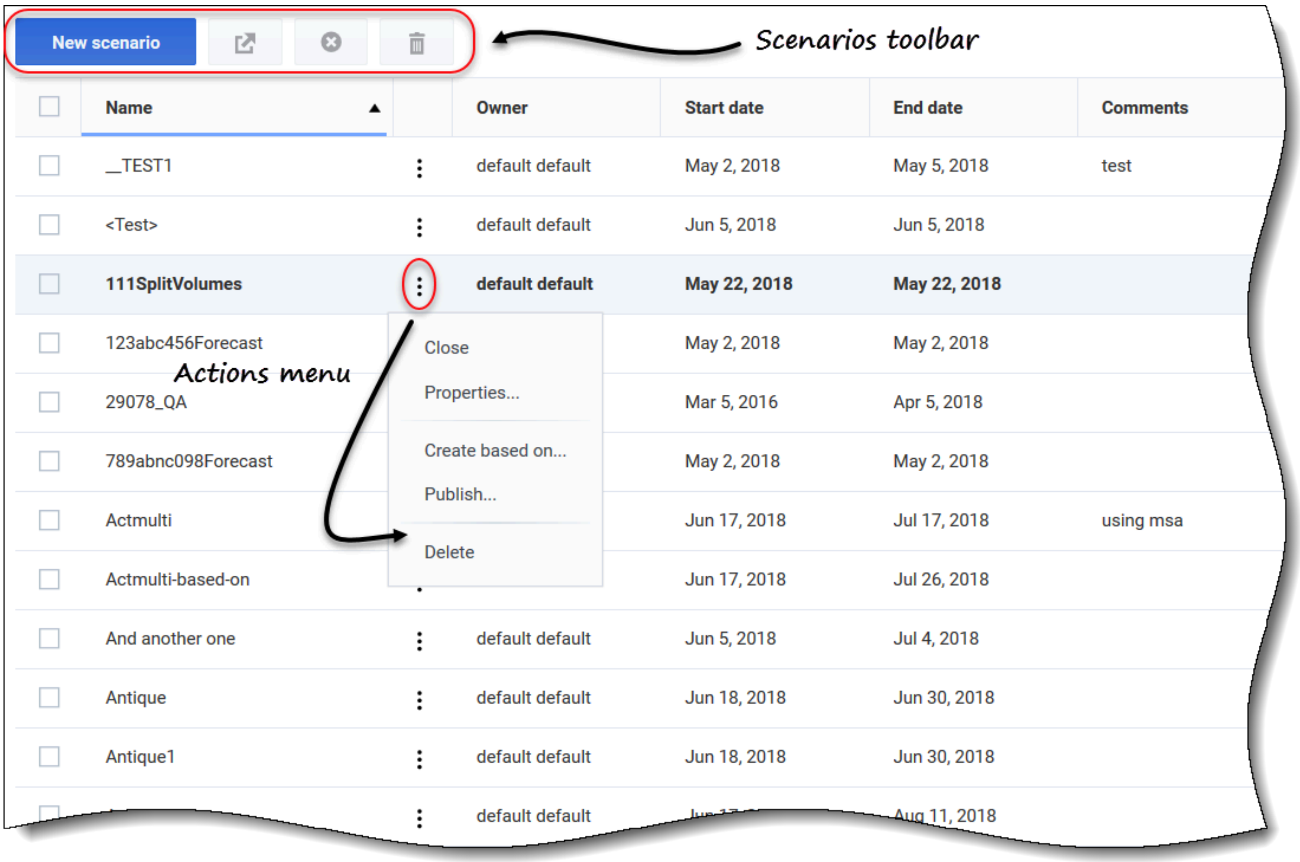


Choose the columns you want to display in the table by clicking **Actions** . The **Show columns** drop-down list opens containing the following columns: **Owner**, **Start date**, **End date**, **Modified**, **Comments**, and **Share status**.

By default, all of the columns are preselected, except **Modified**. Deselect columns to hide them; select columns to display them. If no columns are selected, only the **Name** column is displayed in the table.

To sort the scenarios in ascending and descending order, click the arrow in the **Name** (see graphic), **Owner**, **Start date**, **Modified**, or **Share status** column header.

Using the Actions menu and toolbar

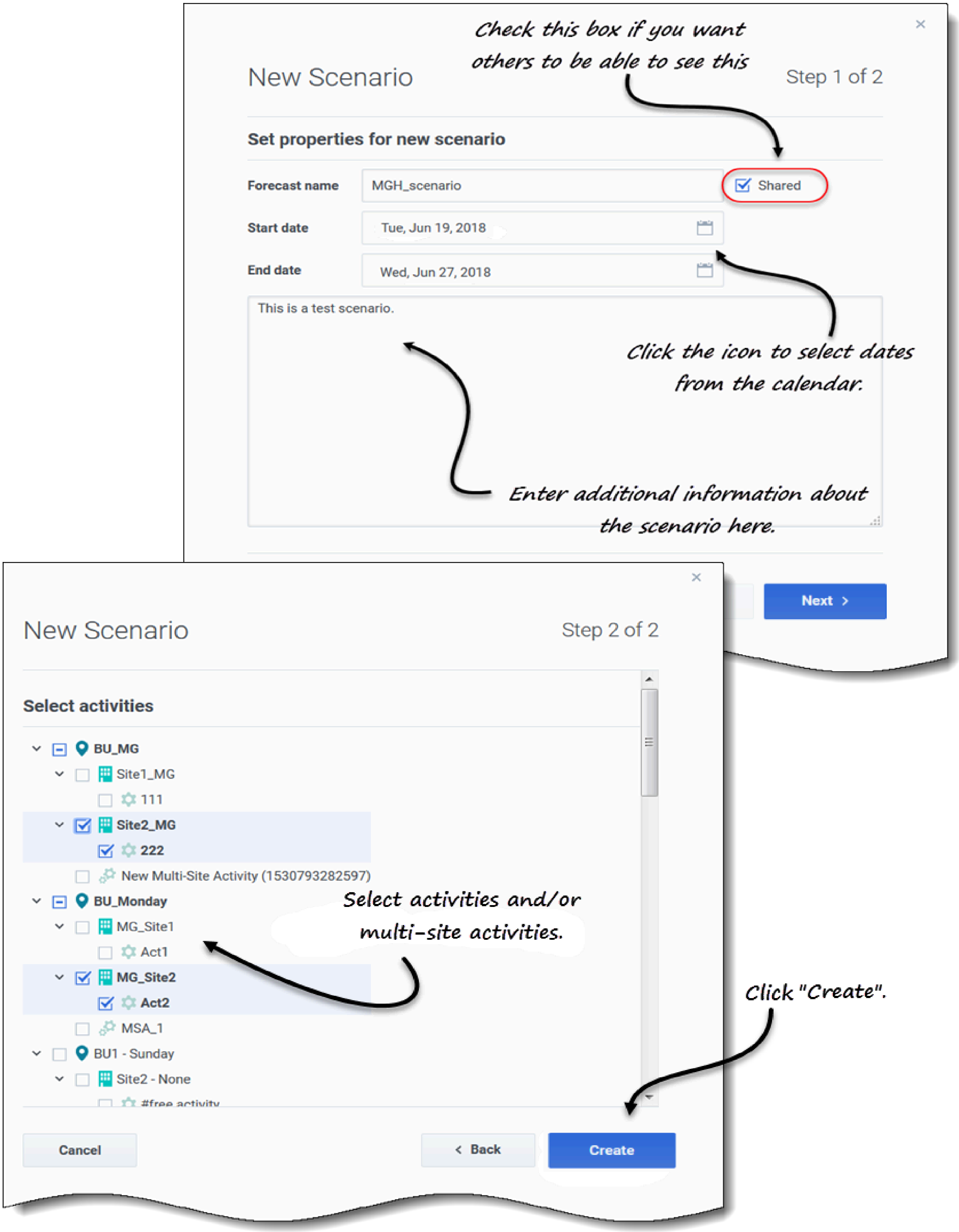


Use the toolbar buttons and the settings in the **Actions** menu to:

- Create scenarios.
- Open, close, and delete scenarios in the list.
- View the scenarios' properties and add comments.
- Create scenarios, based on existing scenarios.
- Publish scenarios to Master Forecasts.
- Extract data from Master Forecasts to put into scenarios.

Creating scenarios

Use the **New Scenario** wizard to create a new forecast scenario. Defining a forecast scenario involves naming the forecast scenario, defining a date range, adding comments (optional), and selecting the activities the forecast will cover. You can also create the scenario based on an existing forecast or build the scenario numbers later.


New Scenario
Step 1 of 2
Check this box if you want others to be able to see this
Set properties for new scenario
Forecast name
MGH_scenario
Shared
Start date
Tue, Jun 19, 2018
End date
Wed, Jun 27, 2018
This is a test scenario.
Click the icon to select dates from the calendar.
Enter additional information about the scenario here.
Next
New Scenario
Step 2 of 2
Select activities
BU_MG
Site1_MG
111
Site2_MG
222
New Multi-Site Activity (1530793282597)
BU_Monday
MG_Site1
Act1
MG_Site2
Act2
MSA_1
BU1 - Sunday
Site2 - None
Select activities and/or multi-site activities.
Click "Create".
Cancel
Back
Create

Creating new scenarios

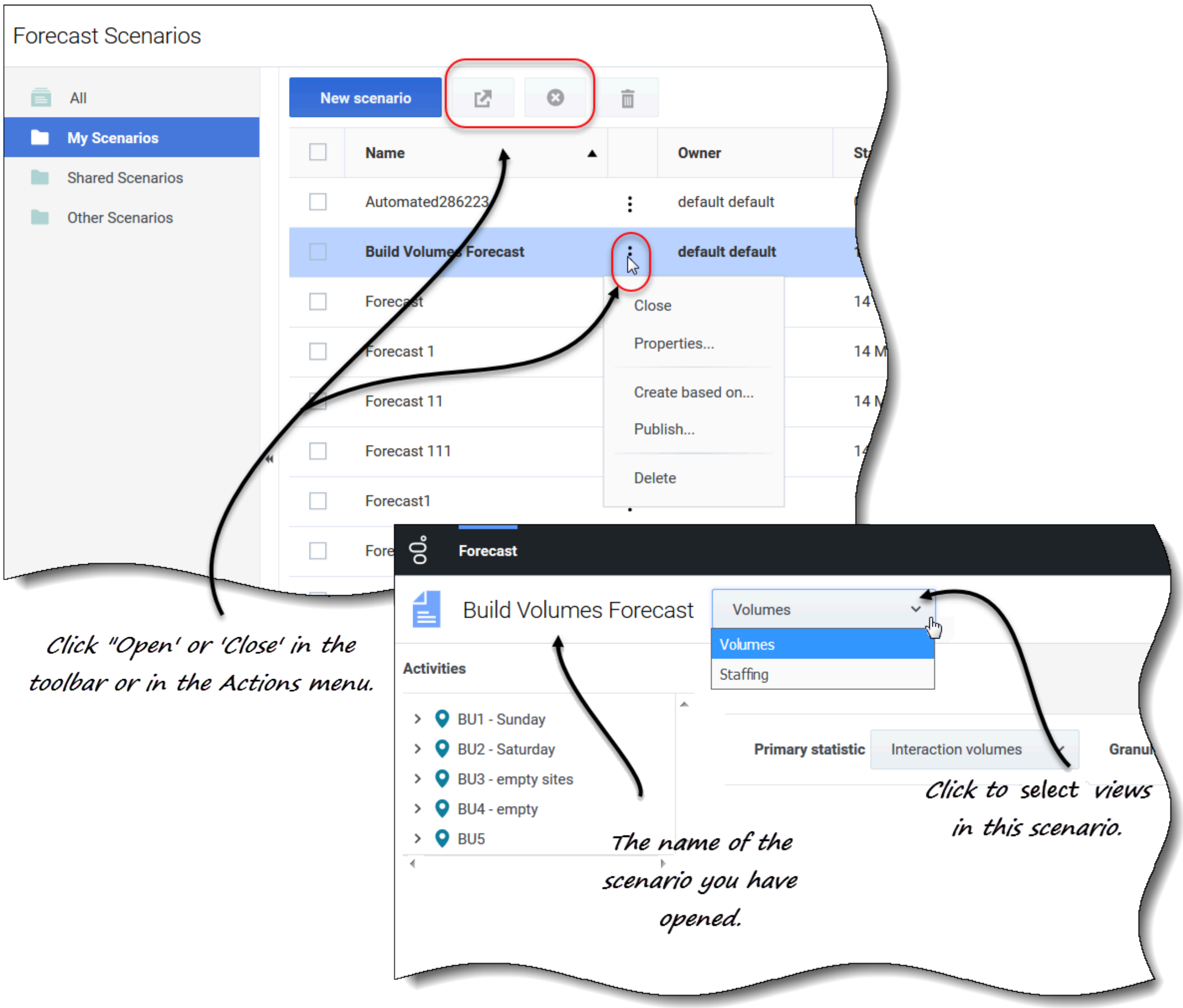
1. In the toolbar, click **New scenario**.
   The New Scenario wizard dialog opens at step 1 of 2.
2. Enter the **Forecast name** (limited to 127 characters).
3. Enter the **Start date**, and **End date**.
   You can enter start and end dates or click the Calendar icon within these fields to select the date from the calendar. The scenario's date range can be up to ten years.
4. If you want others to be able to see this scenario, select **Shared**.
5. In the text box, enter any helpful or relevant information about this scenario.
6. Click **Next**.
7. In the **Select activities** dialog, select one or more activities or multi-site activities.
   You can also add activities to the forecast after it has been created.
8. Click **Create**.
9. When the success dialog opens, click **OK**.

Click **Cancel** at any time to cancel the action and close the wizard. To delete a scenario, see Deleting scenarios.

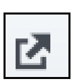
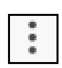
Next steps:

- Build interaction volume and/or AHT into the scenario. For details, see Building volumes data.
- Build staffing into the scenario. For details, see Building staffing data.
- Publish the scenario to the Master Forecast. For details, see Publishing the forecast scenario.

Opening and closing scenarios

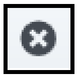


Opening scenarios

1. In the in the **Scenarios** view, select the check box for the scenario.
2. Click **Open**  in the toolbar, or click **Actions**  and select **Open** in the drop-down menu that appears.
   The Volumes, and Staffing views appear in the drop-down menu beside the scenario name (top-left corner).
3. Click a view to open it.

Open scenarios appear in bold in the **Scenarios** view. The Forecast menu retains a list of the 10 most recently opened scenarios, making it convenient for you to switch between them.

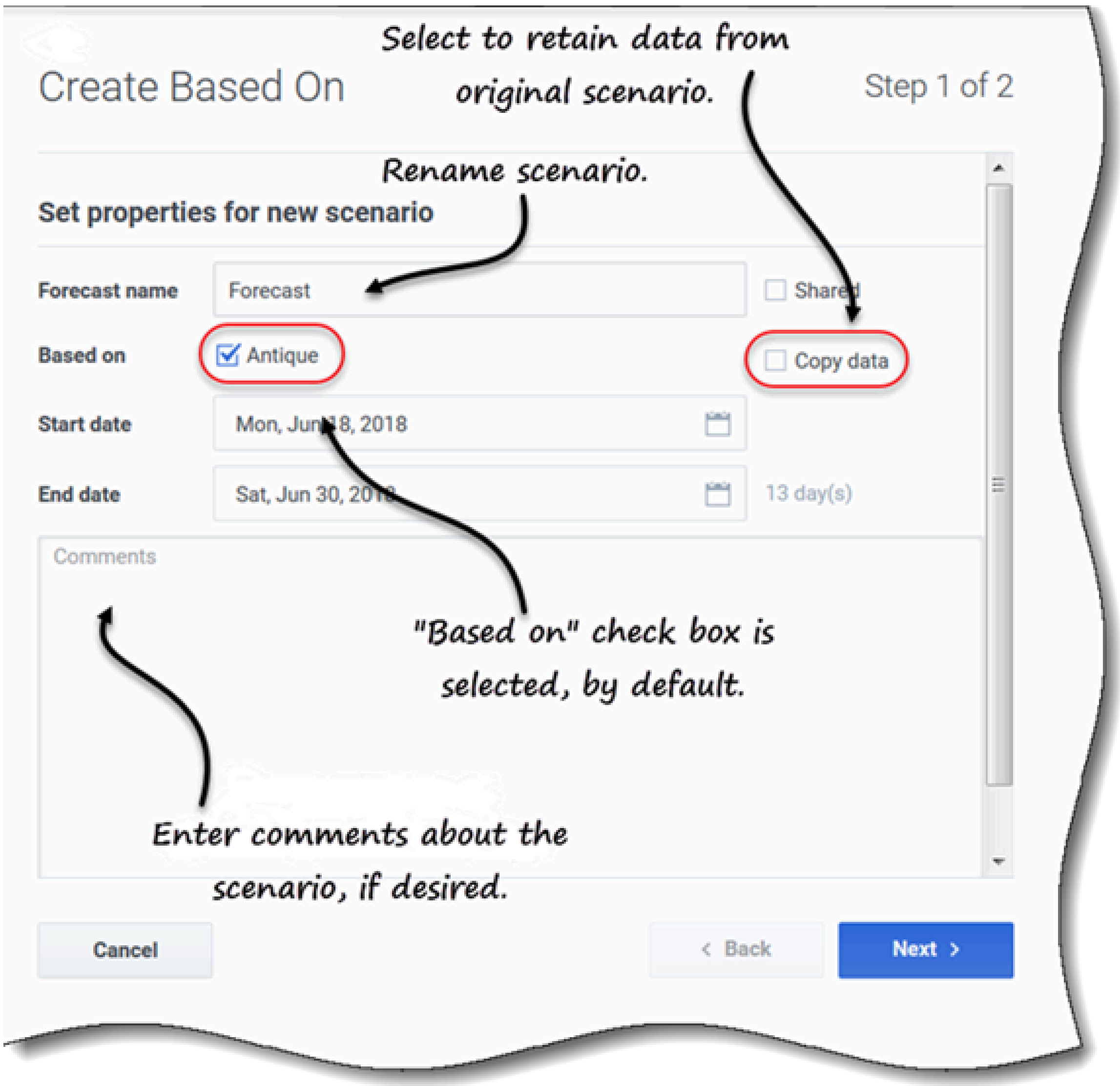
Closing scenarios

1. In the in the **Scenarios** view, select the check box for the scenario.
2. Click **Close**  in the toolbar, or click **Actions**.
3. In the drop-down menu that appears, select **Close**.

To edit the scenario properties, see Viewing and editing scenario properties.

Creating scenarios based on existing forecasts

Basing a new scenario on an existing forecast is a convenient way to build forecasts with frequently used settings. The wizard takes the dates and activities from the source scenario, and applies them to the new scenario, but you can change these settings, if you wish.



Creating scenarios, based on existing scenarios

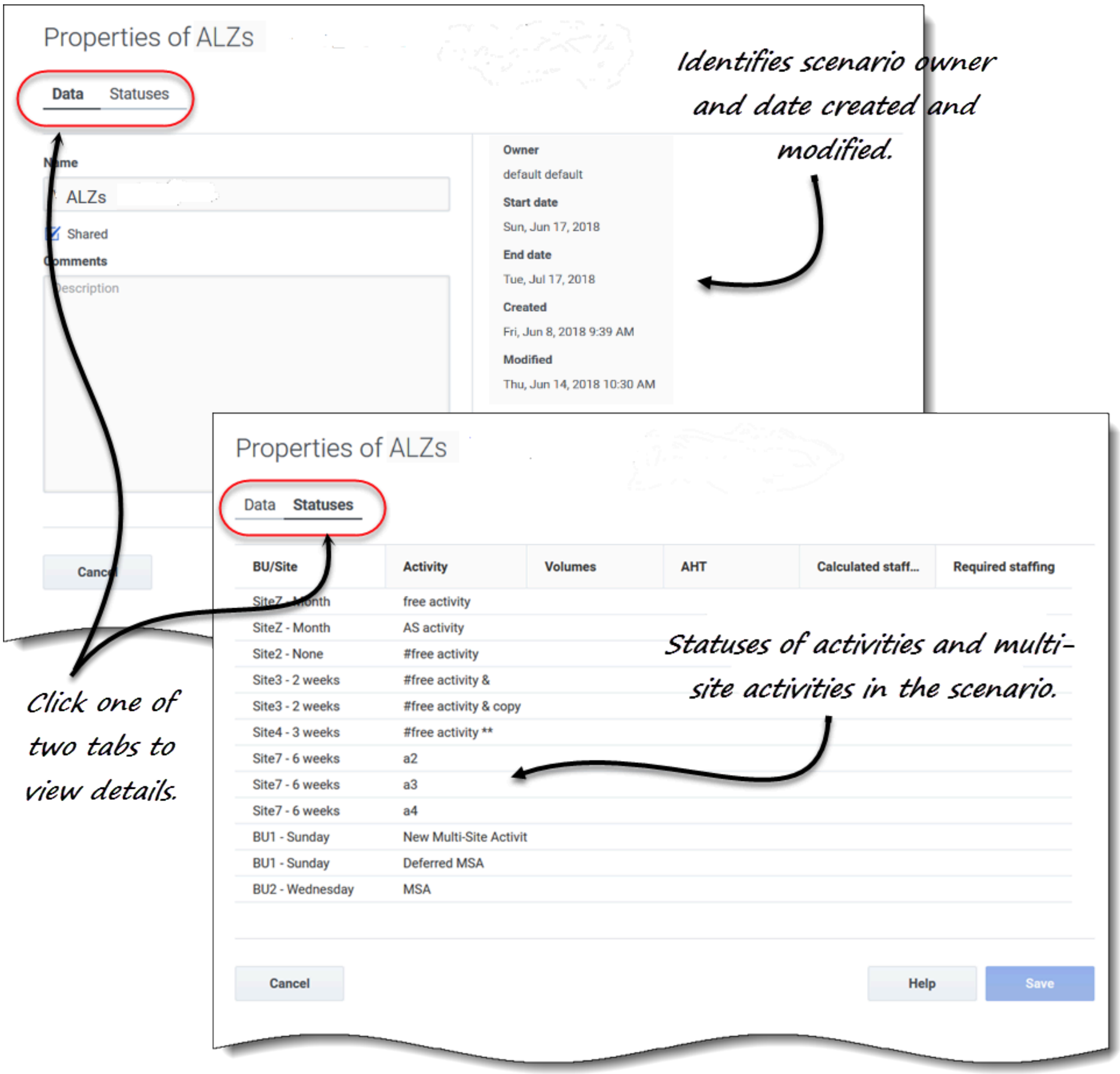
1. In the row of the existing scenario, click the **Actions** drop-down menu and select **Create based on...**. **The Created Based On dialog opens with the Based on check box selected.**
2. If you want to retain the properties of the **Based on** scenario, check the **Copy data** check box.
3. Otherwise, set the properties for this scenario, by following steps 2 - 6 in procedure Creating scenarios.
4. Click **Create**.

The start and end dates, and the activities from the source scenario are selected in the **Create Based On** wizard, by default.

To customize the forecast scenario, change the dates, select additional activities, or clear the selected ones. You can also add activities to a scenario after its been created.

Click **Cancel** or **X** at any time to cancel all actions and close the dialog.

Viewing and editing scenario properties



Viewing scenario properties

1. In the **Scenarios** view, find the scenario you want to view and click the Actions ⋮ menu.
2. In the drop-down list, select **Properties**.
   The scenario properties dialog opens to the Data tab, by default.
3. Click Statuses to view the information in that tab.
4. To close the Properties dialog, click **X** in the upper-right corner or **Cancel**.

Editing scenario properties

1. In the **Scenarios** view, find the scenario you want to edit and click the Actions menu.
2. In the drop-down list, select **Properties**.
   The scenario properties dialog opens to the Data tab, by default.
3. Edit the scenario name, shared status, and/or comments.
4. Click **Save** if you have made changes in the **Data** tab, or **Cancel** if you want to discard all changes.

You cannot change any of the information in the Statuses tab. The fields, controls, and columns in both tabs are described below.

Scenario properties—Data tab

In the **Scenario Properties** dialog, click **Data** to display the information that pertains to this scenario. The **Name**, **Shared**, and **Comments** fields are editable. You cannot edit the name of the person who created the scenario, or the date the scenario was created or last modified.

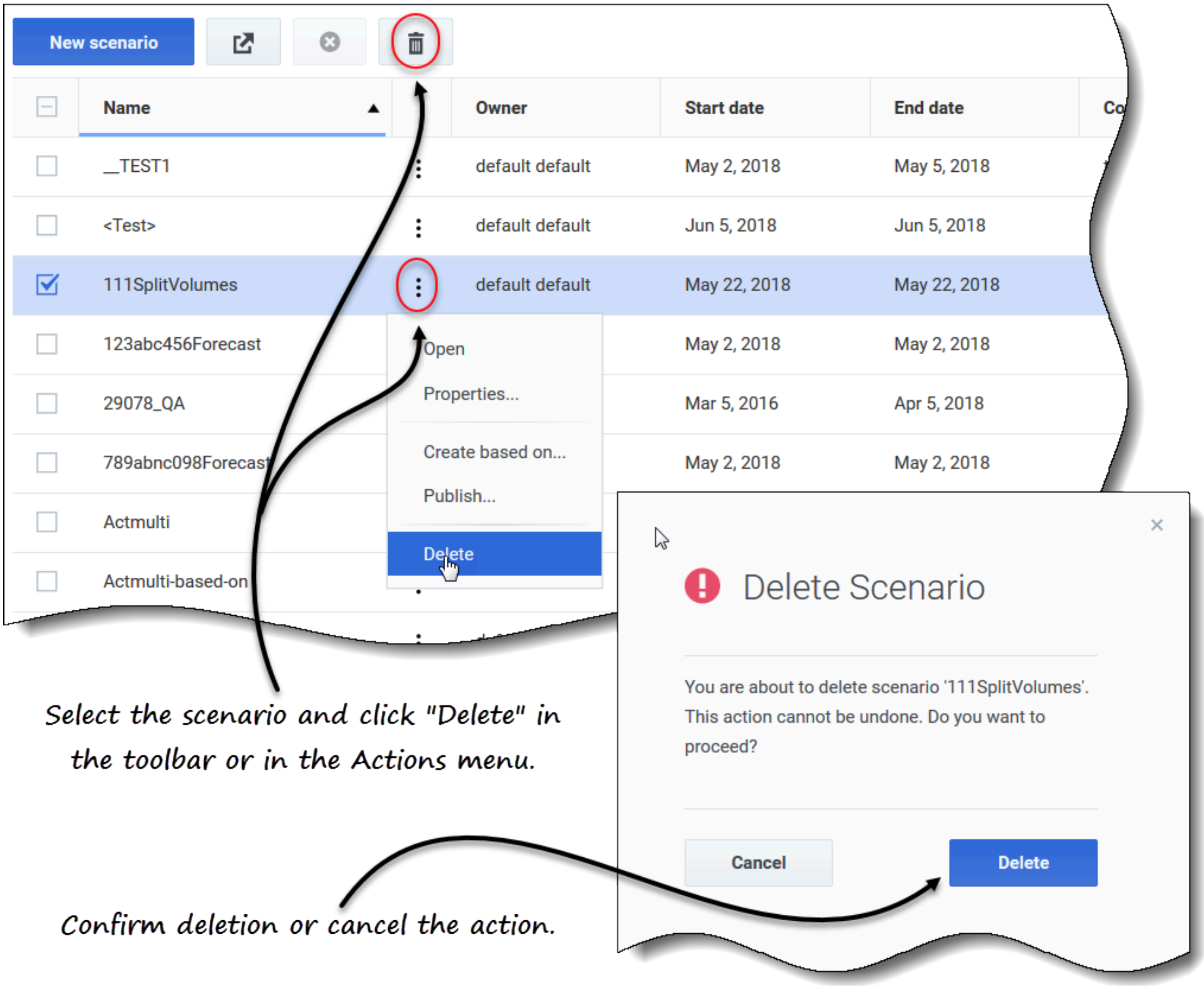
Click **Save** if you make changes to the scenario's name, shared check box, and/or comments. Click **Cancel** if you want to discard any changes you make.

Scenario properties—Statuses tab

In the **Scenario Properties** dialog, click **Statuses** to display the status of the activities, or multi-site activity in the scenario and their associated business unit or site. A check mark in the **Volumes**, **AHT**, **Calculated staffing**, or **Required staffing** column indicates that this statistic was built for this activity.

Deleting scenarios

If you are unable to view or delete scenarios, you might not have the proper access priviliges. See Restrictions: Viewing and deleting forecast scenarios.



Deleting scenarios

1. In the **Scenarios** view, select the scenario you want to delete.
2. Click **Delete** in the toolbar or select **Delete** in the **Actions** drop-down menu.
3. When the confirmation dialog opens, select **Delete** to proceed or **Cancel** to cancel the action.

Deleting multiple scenarios

1. Select all of the scenarios you want to delete (using the check box beside each scenario).
2. Complete steps 2 and 3 in the procedure Deleting scenarios.

Deleting all scenarios in the table

1. Select the top-most check box in the column header (near the **Name** column header).
2. Complete steps 2 and 3 in the procedure Deleting scenarios.

If you are deleting a single scenario, the confirmation dialog contains the scenario name. If you are deleting multiple scenarios, the confirmation dialog states the number of scenarios being deleted.

Publishing and extracting forecast data

Use the **Publish or Extract** wizard to transfer or publish the forecast scenarios data to Workforce Management database's Master Forecast, or to extract the data in the Master Forecast to forecast scenarios.

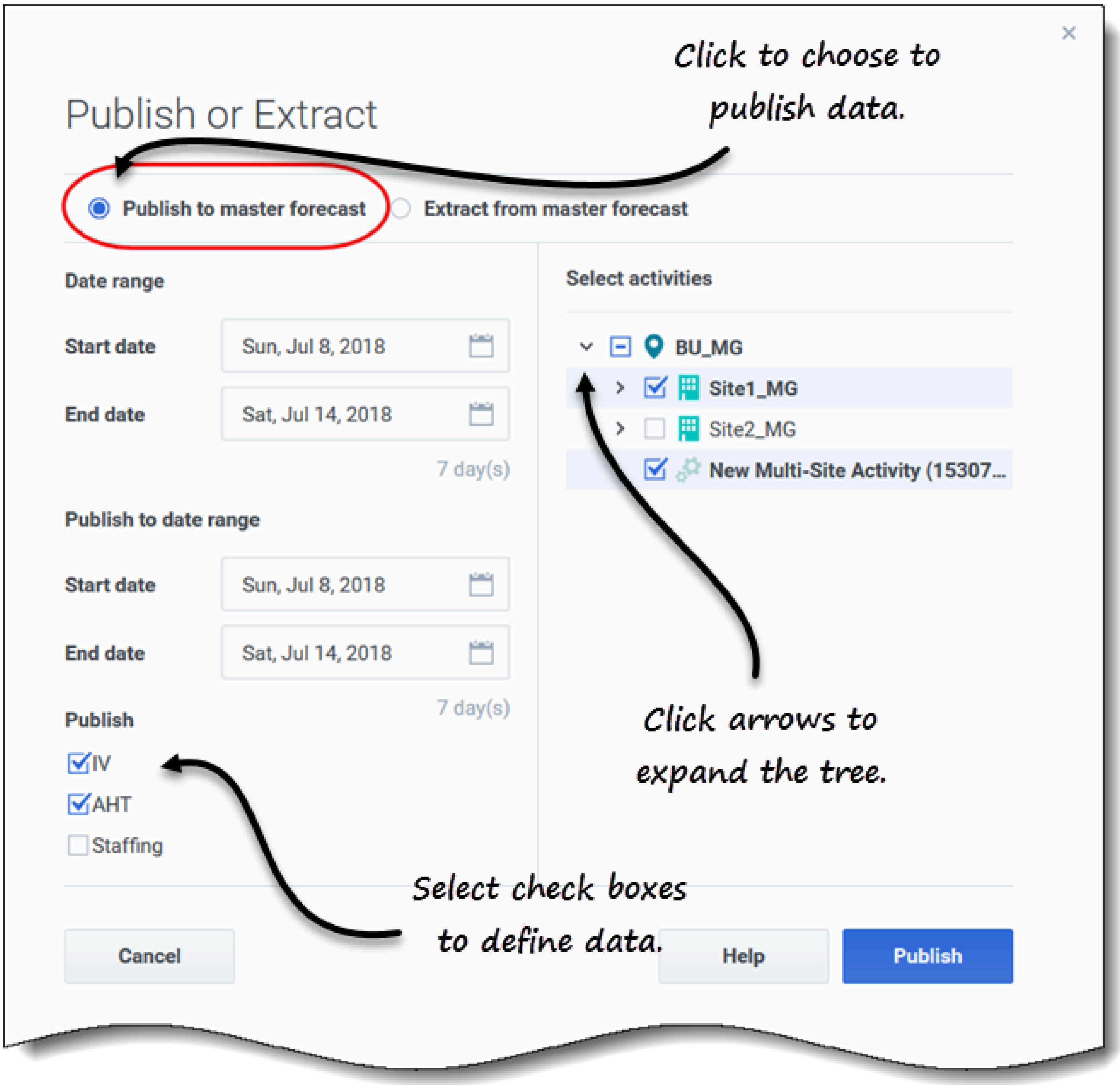
Important

You must have the **Publish** role privilege to publish IV, AHT, and/or Staffing data to the Master Forecast. See Forecast Role Privileges

Why publish forecasts?

Publishing a forecast means that the forecast is final. Schedules for a particular date range are based on the published (Master) forecast for those dates. Until a forecast is published, you cannot calculate certain performance data.

Publishing the forecast scenario



Publishing forecast scenarios to master forecasts

1. In the **Forecast Scenarios** view, click Actions ⋮ next to the scenario that you want to publish, and select **Publish**.
   The Publish or Extract dialog opens.
2. Click **Publish to master forecast**.
3. Select or enter a start and end date for the **Date range**.

4. Select or enter a start and end date for the **Publish to date range**.
5. Select one or more check boxes: **IV**, **AHT**, **Staffing**.
   These check boxes are not visible if you do not have the proper WFM role privileges.
6. Expand the business units and sites to select the activities you want to publish.
7. Click **Publish**.
8. When publishing is complete, click **OK**.
   Alternatively, click Cancel at any time to discard the settings and close the dialog.

The tree shows all activities for which the selected scenario contains data, enabling you to select multiple activities from different sites.

> ### Tip
> You can also publish forecast scenarios using the **Save** drop-down menu in the **Scenario** > **Volumes**, **Staffing**, and **Shrinkage** views if you have modified the scenario data after it's been published. For example, see Editing daily totals in the grid

Defining start and end dates when publishing data

When publishing data, the start and end date values in the **Date range** section define the date range for which you want to publish information from the selected scenario. By default, the selected scenario's own start and end dates appear in these text boxes, and you cannot select dates outside the original scenario dates.

The start and end date values in the **Publish to date range** section define the date range for which you want to update information in the Master Forecast. By default, these fields' entries match those in the **Date range** section. Data from a specific weekday is copied only to the same weekday. That is, forecast information for a Monday is copied to one or more Mondays, depending on the target date range that you select. Monday's data is not copied to every other day within the target date range.

The start date in each date range in the **Publish or Extract** dialog occur on the same day of the week. The dialog shows the number of days in each date range below the **End date** field.

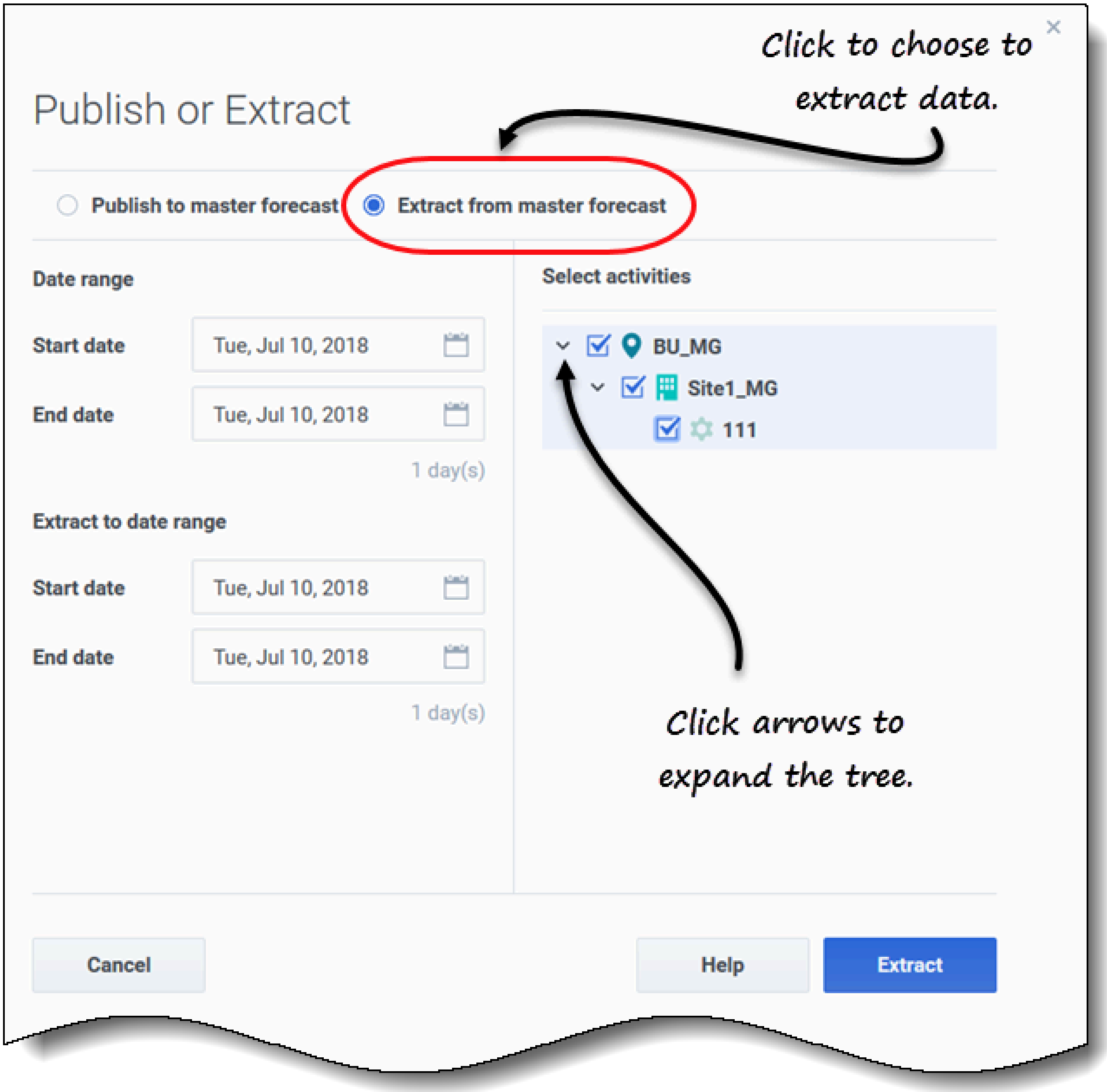
Viewing Review messages

If you have entered invalid data when completing the **Publish or Extract** wizard, after clicking **Finish** the **Review Messages** dialog opens containing a list of errors:

- Click **Back** to return to the **Publish or Extract** dialog and make the necessary changes.
- Click **Cancel** to close the wizard and discard the previous settings. The scenario will not be published.

If you enter invalid values in the wizard, validation messages will appear below the respective fields, prompting you to enter valid values.

Extracting the Master Forecast data



Transferring data from master forecasts to forecast scenarios

1. In the **Forecast Scenarios** view, click **Actions** ⋮ next to the scenario for which you want to extract data, and select **Publish**.
   The Publish or Extract dialog opens.
2. Click **Extract from master forecast**.
3. Select or enter a start and end date for the **Date range**.

4. Select or enter a start and end date for the **Extract to date range**.
5. Expand the business units and sites to select the activities you want to extract to the target scenario.
6. Click **Extract**.
7. When extraction is complete, click **OK**.
   Alternatively, click Cancel at any time to discard the settings and close the dialog.

The tree shows only those activities that are included in the forecast scenario. Expand business units and sites to display activities.

Defining start and end dates when extracting data

When extracting data, the start and end date values in the **Date range** section define the date range for which you want to extract information from the Master Forecast. By default, these values match those in the **Extract to date range** section.

The start and end date values in the **Extract to date range** section define the date range for which you want to update the information in the selected target scenario. By default, the scenario's own start and end dates appear in the text boxes, and you cannot select dates outside the scenario's original date range.

Volumes in scenarios

Contents

Learn about the types of data you'll find in the Volumes grid, how to navigate it, and customize it.

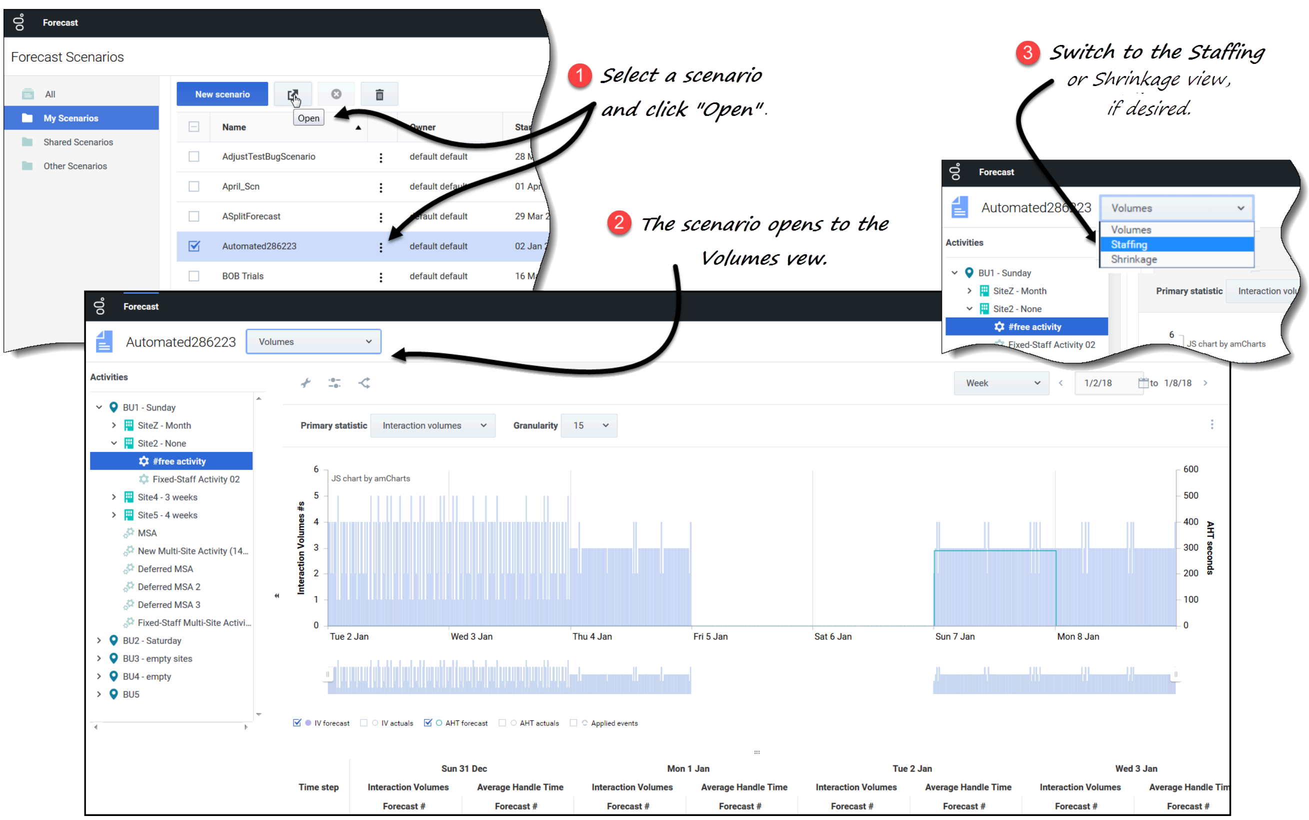
Related documentation:

-

In Workforce Management (WFM), you'll use the Scenarios **Volumes** view to build or edit the selected forecast scenario's interaction volumes and average handle times. This view provides a graph and grid that shows statistics for a specified time period and standard date-selectors.

Viewing the volumes data

Scenarios open to the **Volumes** view where you can view, build, or edit the volumes data. When you select an object in this view, the start date is determined by the selected business unit's week start day setting, regardless of your locale settings. Watch the video.



Opening the Volumes view

1. In the **Forecast** module, select **Scenarios**.
2. Select a scenario from the list in the data pane, and click **Open** in the toolbar or in the **Actions** drop-down menu.
   The Volumes view opens with the scenario name in the top-left corner of the window.
3. In the **Objects** tree, select an activity, multi-site activity, site, or business unit.
   The view displays a graph above a table, each containing the same statistics and controls that set the data display properties.

If you have not selected an activity, you'll see the message Select an activity within the nested tree to load volumes.

Link to video

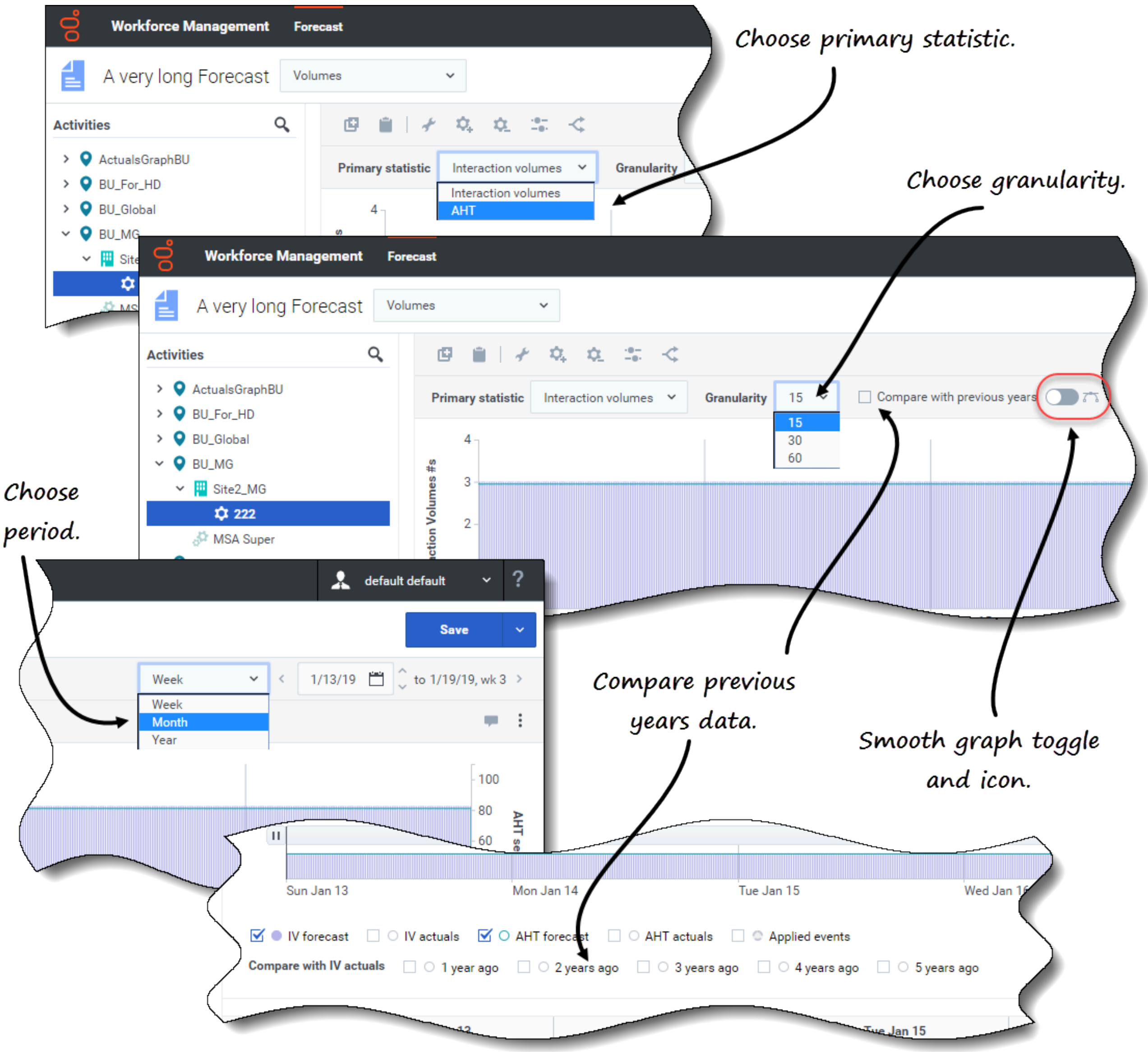
If you do not see any forecast data, you might have to adjust the Period drop-down list, the sliders (below the graph), or the Granularity and **Date** controls at the top of the window to reflect those used for the forecast.

The grid displays open hours for selected site activities and multi-site activities in the same way.

You can also view, add, and edit the staffing or shrinkage data in opened scenarios, by selecting Staffing or Shrinkage from the drop-down menu near the scenario name.

Setting the data display properties

In this view, the graph's y-axis represents the values for the selected statistic (IV or AHT); the x-axis represents the selected period (week, month, or year).

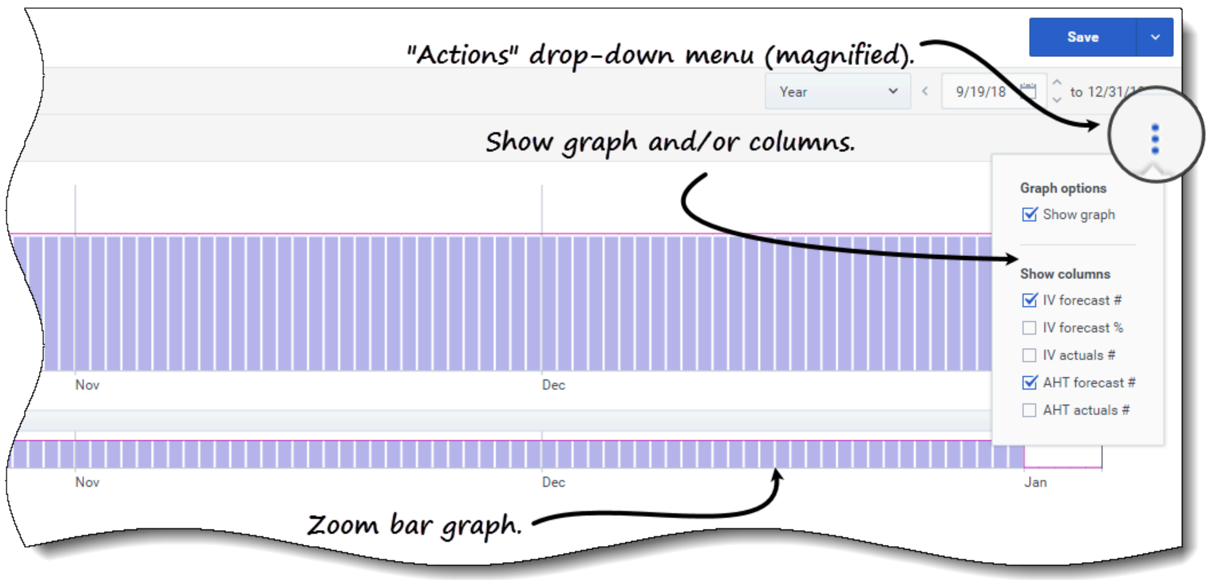


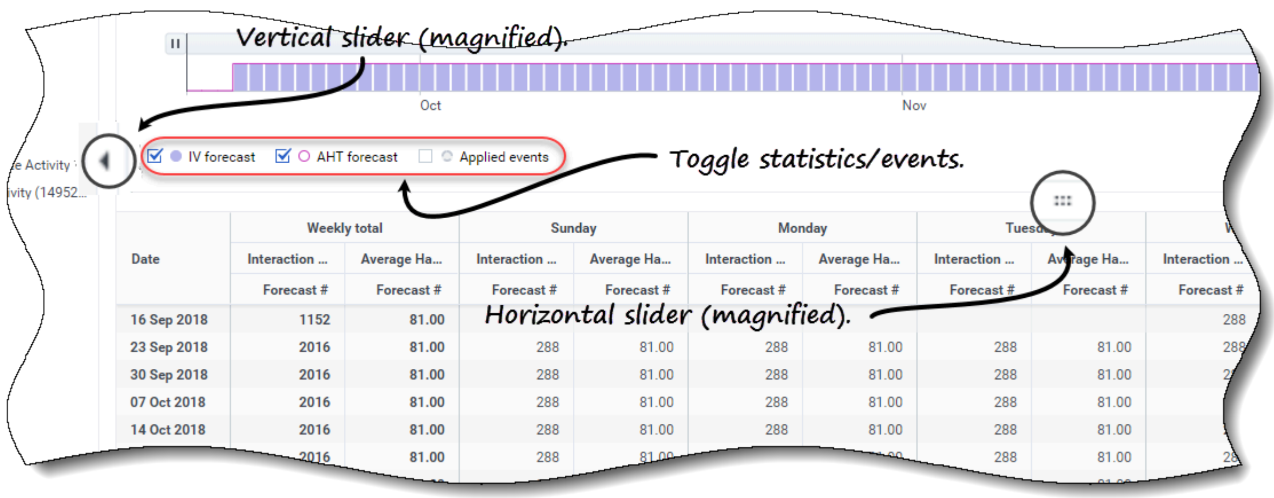
See the following controls to customize the data display in the graph and table:

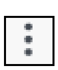
- **Primary statistic** *drop-down list*—Select the statistic that will be displayed as primary, by selecting **Interaction Volumes** (IV) or **AHT** (average handle time). The primary statistic displays as a bar in the graph and the secondary statistic displays as a line.
- **Period** *drop-down list*—Change the time range for the graph and grid by selecting **Year**, **Month**, or **Week**.
- **Granularity** *drop-down list*—Adjust the granularity to **Day** if you selected **Month** or **Year** in the **Period** drop-down list. Adjust each row's time range by selecting **15**, **30**, or **60** (minutes) from this list if you selected **Week** in the **Period** drop-down list.
- **Compare with previous years** *check box*—Check to compare the IV or AHT data to the historical IV or AHT data, based on the primary statistic. When checked, WFM displays more check boxes below the

smooth graph, enabling you to compare IV or AHT data to data from 1 - 5 years ago. See more about historical data here.

- **Date range**—Use the date-selectors (top-right portion of the view) to switch to a different period within the scenario forecast's date range. The week number is also displayed here when the selected period is **Week**.





-  **Actions** *drop-down menu*—Click this icon to change the graph and/or table:
  - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also Sliders.
  - **Show columns**—Show/hide data columns in the table by selecting/clearing the following check boxes:
    - **IV forecast #**
    - **IV forecast %**

- **IV actuals #**
- **AHT forecast #**
- **AHT actuals #**

Click anywhere in the view to close the drop-down menu.

- **Statistics/Applied events** *check boxes*—Below the graph, toggle a statistic or applied events on or off. Selecting the check box or clicking the radio button toggles it on, displaying the primary statistic as bars, the secondary statistic as a red line, and applied events as a striped orange line. Clearing the check box or clicking the radio button toggles it off, making the statistic or event invisible in the graph. When turned on, the primary statistic's radio button is light blue and the **Applied events** button is yellow.

For single-day events, the striped orange line covers the start of the day to the end of the day—Even when you zoom in the graph. For multi-day events, the striped orange line covers the event start date to the event end date. Hovering over the event in the graph opens a tooltip that shows the event name and date.

Event types, including Applied events, are defined in Understanding event types.

Using the graph, zoom bar, and sliders

Watch the video to see a demonstration of the features in the Volumes views, shown in the graphics above and described here:

Link to video

-  **Smooth graph** *button* and *icon*—Edit the bar graph (using the button or icon) when an activity is selected in the **Objects** pane and this feature is toggled on.
The bars representing the primary statistic come to the front of the graph and become bold, the line representing the secondary graph fade to the background, and the x-axis zoom is disabled.
Clicking any bar in the graph reveals a handle, enabling you to drag the bar up or down. The corresponding cell in the grid is highlighted and the value increases or decreases as you move the bar graph up and down. Similarly, if you click any cell in the grid and change the value, the corresponding bar graph changes accordingly.
Dragging the bar to the upper limit of the y-axis increases the y-axis scale, causing the remaining bars to scale down proportionally. If the bars are too narrow to select easily, toggle off the smooth graph and switch your view to another time period or use the Zoom bar.

- **Sliders**—Drag the vertical slider left/right to show/hide the graph, zoom bar, grid and/or **Objects** pane. Click the arrows in the vertical slider to resize the **Objects** pane. Drag the horizontal slider up/down to show/hide the graph and/or grid.
- **Zoom bar**—Use the zoom bar handles to narrow or widen the focus in the graph, by sliding the handle left or right. You can zoom to a minimum of one day. After narrowing the focus, place your cursor over the graph and change the range of the zoom by dragging and dropping it to the left or right. For example, if you narrow the focus to Sunday, Monday, and Tuesday, but want to change it, drag and drop the zoom to the right to Tuesday, Wednesday, Thursday.

Reading the Data

The grid (below the graph) provides columns that display the following statistics:

- **Daily total**—If you select the period **Week**, this row shows daily totals for **IV** and **AHT**.
- **Weekly total**—If you select the period **Month** or **Year**, these columns show the weekly totals for **IV** and **AHT**.
- **Date/Time step**—Identifies the range of dates or timesteps in this row. The column name and contents will differ, depending on the period and granularity you selected above.
- **[Days or Dates]**—If you select the:
    - **Week** date range—Each group of columns indicates one day, the top row shows daily totals, and each lower row shows statistics for one timestep on that date.
    - **Month** date range—Each group of columns shows statistics for one full day.
    - **Year** date range—Each group of columns shows statistics for one full day.

  Timestep duration depend on the granularity that you selected above.
- **Interaction Volumes**—Shows the interaction volume forecasted for each day or timestep. You can edit the cells' contents, replacing the displayed values with integer values.
- **Average Handle Time**—Shows the average handling time forecasted for each day or timestep. You can edit the cells' contents, replacing the displayed values with integer values (with two decimal points).
- **Compare with IV actuals**—Compares actual IV data with historical IV data that was imported or collected. When comparing data to previous years, WFM displays the same weekdays as the actual, irregardless of the selected period (Week, Month Year). For example, if the specified date range is Thursday, Nov 1st 2018 to Friday, Nov 30th 2018:
    - If **1 year ago** is selected, the actual IV is compare to the historical date range Thursday, Nov 2nd 2017 to Friday, Dec 1st 2017.
    - If **3 years ago** is selected, actual IV is compare to the historical date range Thursday, Oct 29th 2015 to Friday, Nov 27th 2015.

> **Tip**
>
> You can copy and paste data between the grid and a spreadsheet.

Editing data in the grid

In the **Scenario** > **Volumes** grid, WFM enables you to edit forecast and actual values. You can edit timesteps and daily totals when the selected period is **Week** and edit weekly and daily totals when the selected period is **Month** or **Year**.

When changing the period, granularity, and/or values in the grid, note that daily totals are aggregated values for a 24-hour period. This means the daily and weekly totals automatically adjust and are redistributed according to the original distribution of volume for each day of the week or week of the month/year. 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.

> **Tip**
>
> You must have the Forecast access privilege **Edit Historical Data** to edit Actual IV and Actual AHT values in the grid.

Editing IV values

Here are some things to keep in mind when editing IV values in the grid. If you edit the IV Forecast %:

- **Time step** values—WFM recalculates IV Forecast # and IV Forecast % values for all time steps on days that have IV values greater than `0`.
- **Daily total** values—WFM recalculates IV Forecast # and IV Forecast % values for all time steps on days that have IV values greater than `0`. The IV Forecast # daily total is changed but the resulting IV Forecast % daily total will be 100%.
- **Weekly total** values—WFM recalculates IV Forecast # and IV Forecast % values for all week days that have IV values greater than `0`. The IV Forecast # daily totals are changed but the resulting IV Forecast % daily and weekly totals will be 100%.

IV Forecast % values cannot be greater than 100%. IV Forecast % daily and weekly total must be 100%.

Editing modes

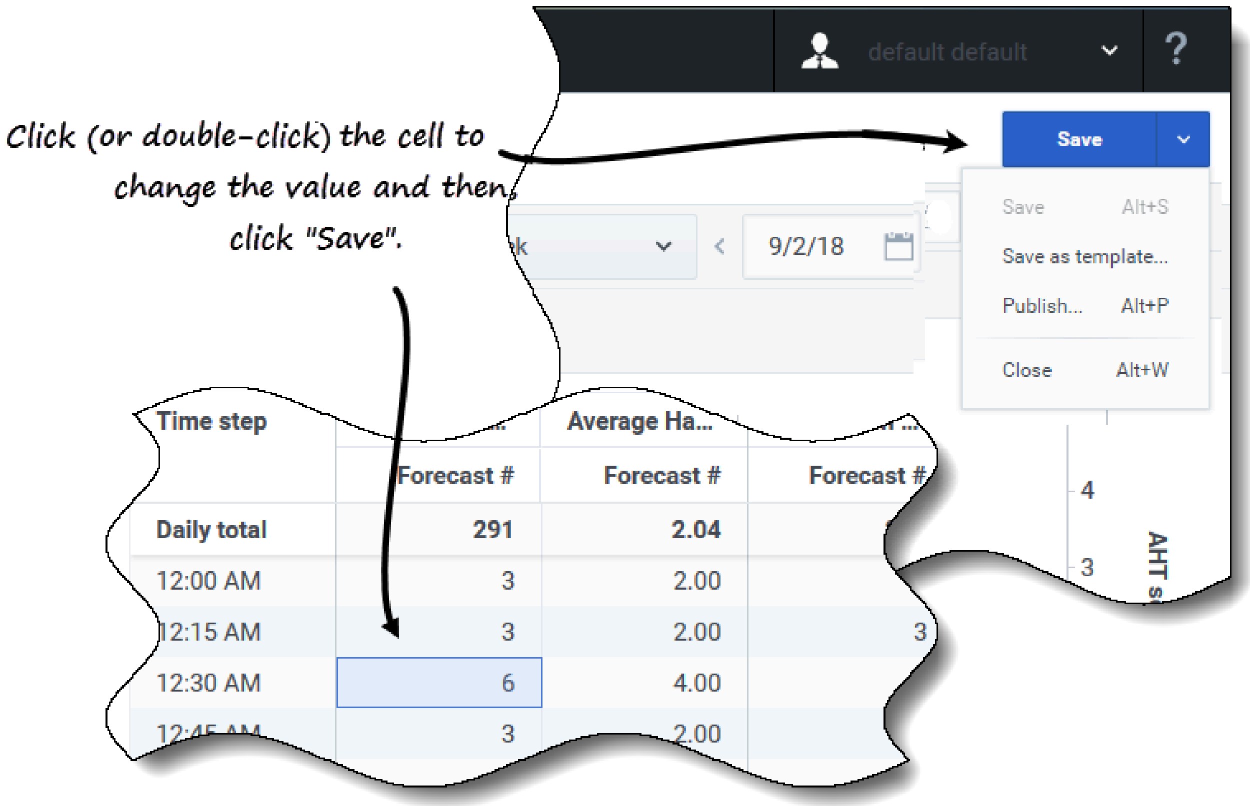
WFM provides two editing modes in the Volumes grid. Single-clicking a cell puts it into quick-editing mode and double-clicking a cell puts it into deep-editing mode. You can use either method for all editing functions.

Navigating the grid

In the grid, you can move from cell to cell by using the Enter or Shift+Enter keys on the keyboard. Click a cell and press:

- the Enter key to move the focus to the cell below the one selected.
- the Shift+Enter keys to move the focus to the cell above the one selected.

If you select a cell in the **Daily total** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.



Editing values in the grid

1. Click (or double-click) the cell you want to change and enter a value.
2. When you have finished, in the upper-right corner of the view, click **Save** (or use the hotkey combo **Alt+S**).
   A message appears in the lower-right corner, indicating your changes were saved successfully.

If you switch to another view without saving the changes, a dialog opens with the message *Would you like to save changes to* . Click:

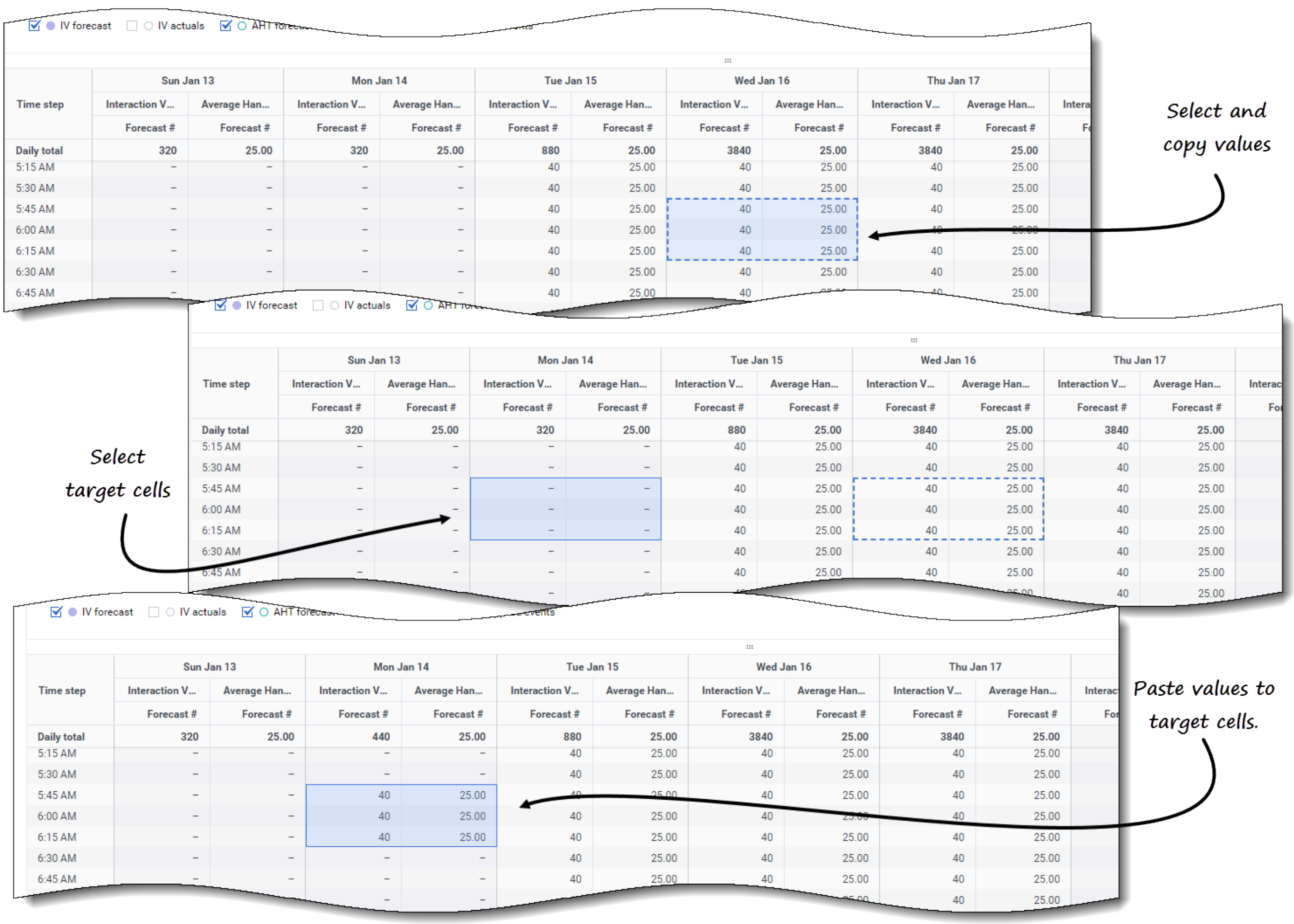
- **Save** to save the changes and switch to another view.
- **Discard** to discard the changes and switch to another view.
- **Cancel** to cancel the action, close the dialog and return to the Volumes view.

In the **Save** menu, you can also select:

- Publish (**Alt+P**) if you have modified the scenario data and want republish it.
- Save as template... to save this scenario as a template.
- **Close** (**Alt+W**) to close the scenario.

Selecting data to copy and paste

> **Tip**
>
> If you are unable to copy/paste, ask your administrator to confirm that your environment is using HTTPS secure connections to WFM.



Use **Copy** and **Paste** in the toolbar or use the Ctrl-C and Ctrl-V key combinations on your keyboard to select data in the **Volumes** view grid for copying and pasting. You can copy/paste within the grid and to/from documents, such as Excel or Notepad. You can also copy and paste data from Master Forecasts and other scenarios.

Copy and **Paste** are enabled in the toolbar when you select a single cell or a range of cells. When selected, cells are highlighted and bordered with a bold solid line. When copied to the clipboard, they are bordered with a dashed or broken line. Targeted or pasted cells are highlighted and bordered with a bold solid line.

When you copy empty cells together with cells that contain values, they are pasted as empty cells, overwriting any original values.

For some key combinations, you must select values in the **Daily values** row, **Time step** column, and **Date** column (when the selected period is **Month** or **Year**) separately. They cannot be selected with other rows or columns in the grid. Also, time step values and dates can be pasted only to external sources (not into the grid). You cannot select, copy, or paste the Timestep header row (Mon, Tue. etc.).

The grid scrolls automatically when you select a range of cells using the Arrow, Home, End, Page Up, or Page Down key, or the Shift+Arrow, Shift+Home, Shift+End, Shift+Page Up, or Shift+Page Down keys. However, if you select more cells to copy than you select for paste, only a part of data is pasted. See more information about these functions in Managing templates.

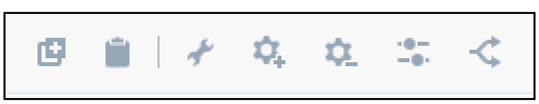
You cannot paste data if you have:

- Selected days that are outside of the scenario date range.
- Selected a business unit or site in the **Objects** pane. You must select an activity or multi-site activity.
- Selected values in the IV% column

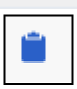
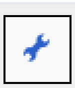
Attempts to paste any of the following invalid values into the grid or **Daily totals/Average** row results in the message: *Cannot paste invalid values.*

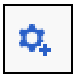
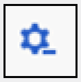
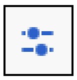
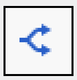
- Letters, special symbols, or negative values
- Non integer values for IV
- AHT decimal values that have more than 2 digits after the period
- Values that are out of range

Using the Scenario Volumes toolbar



Use the following buttons on the toolbar (above the graph) to modify and manage volumes data:

Icon	Name	Description
	**Copy**	Copies data selected in the grid to the clipboard.
	**Paste**	Pastes data from the clipboard to the selected area in the grid.
	**Build**	Opens the Build Volumes wizard, enabling you to build volume data for the selected activity.

Icon	Name	Description
	**Add activities**	Opens the **Add Activities** dialog, enabling you to add activities and/or multi-site activities to existing scenarios. Find the procedure here.
	**Remove activities**	Opens the **Remove Activities** dialog, enabling you to remove activities and/or multi-site activities from existing scenarios. Find the procedure here.
	**Adjust**	Opens a Adjust Volumes dialog, enabling you to adjust the volume, average handling time (AHT), or both for the **Scenario Forecast Volumes** view.
	**Split**	Opens the Split Volumes wizard, enabling you to split interaction volumes from a multi-site activity to site-specific activities.

Building volumes

Contents

Set parameters that will be used to build volumes data in forecast scenarios for one or multiple activities.

Related documentation:

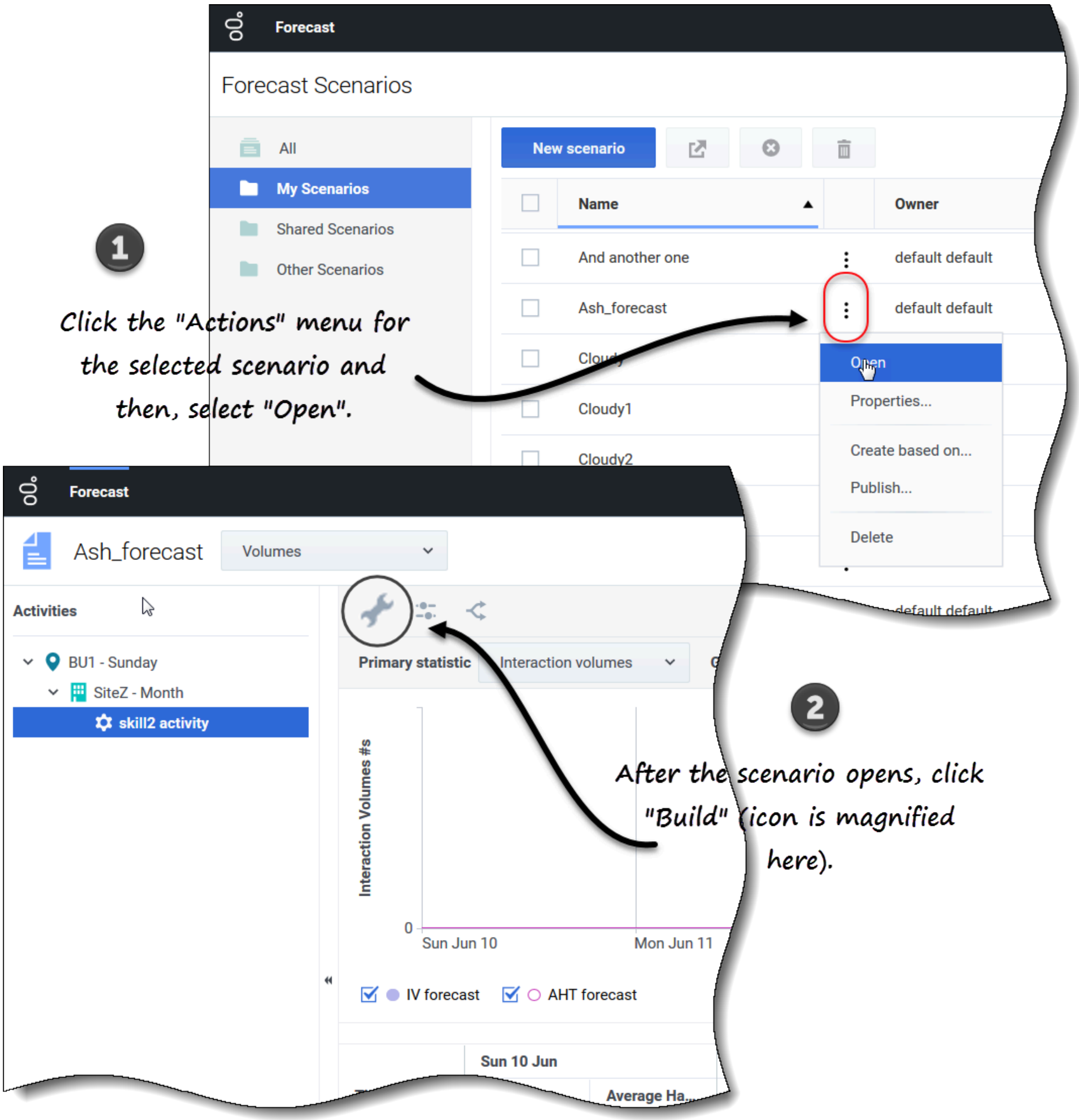
-

In Workforce Management (WFM), you'll use the Build Volumes wizard to build volumes data in forecast scenarios for one or multiple activities, using parameters that you specify.

Before using this wizard, think about the build method you want to use. Depending on your choice, you might need to import historical data or create interaction volume, average handling time, or templates before building volumes data.

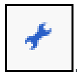
Building volumes data

Use the Build Volumes wizard when you are creating new scenario volumes or if you want to overwrite an existing scenario volumes. Do not use it if the correct volumes data already exists in the Scenario Volumes view.



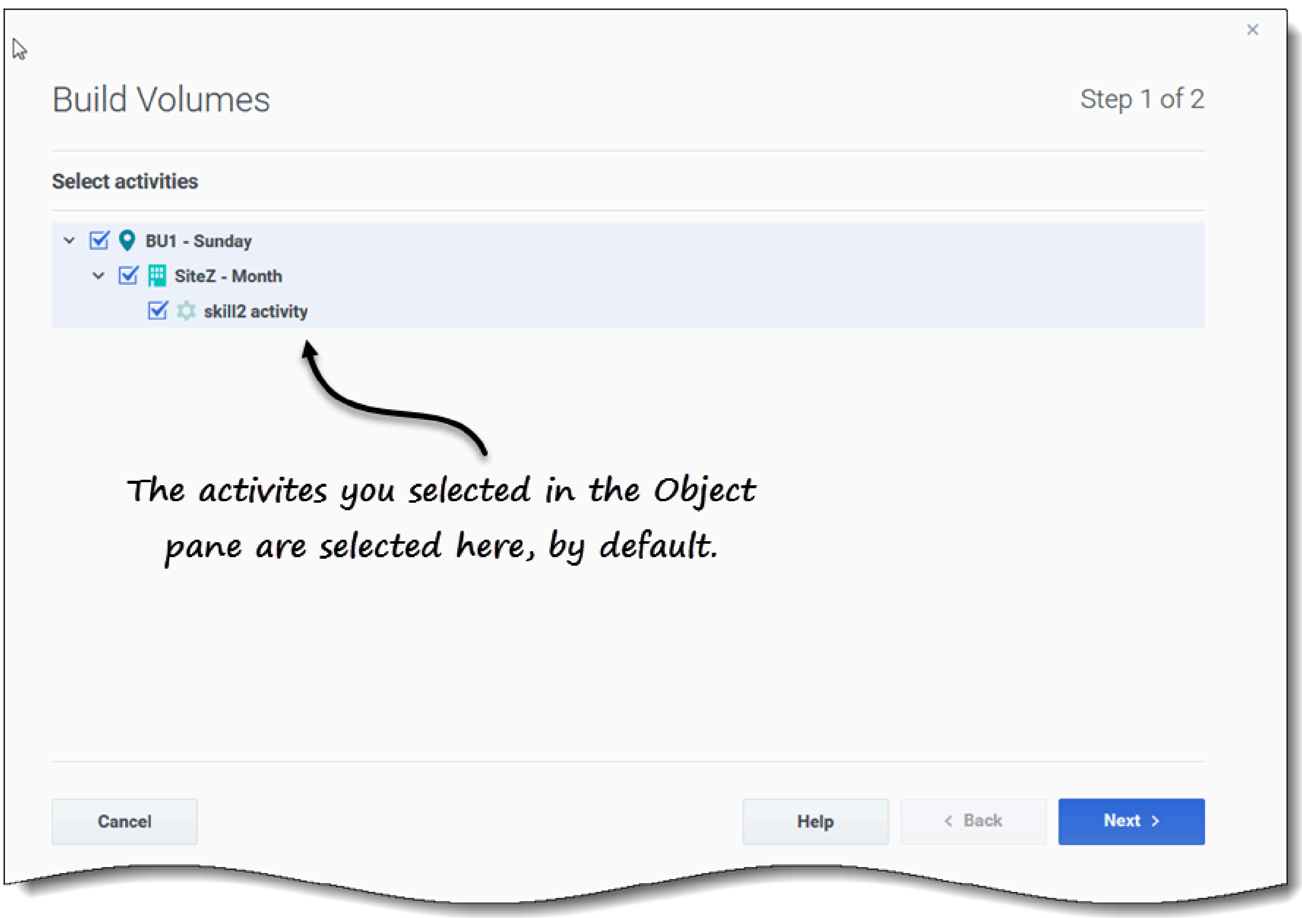
Building volume data

1. Select a scenario and click **Open** on the toolbar or in the **Actions**  drop-down list.
   The Scenario Volumes view opens.
2. In the **Objects** pane, expand the tree to select an activity or multi-site activity.

3. On the toolbar, click **Build** .
   The Build Volumes wizard opens.
4. Select the activities that will be associated with this scenario volume. See Step 1
5. Select the target date range and build method. See Step 2.

Step 1: Selecting activities for the scenario

The activities you previously selected for the scenario in the New Scenario wizard Select activity screen appear for selection.



Selecting activities

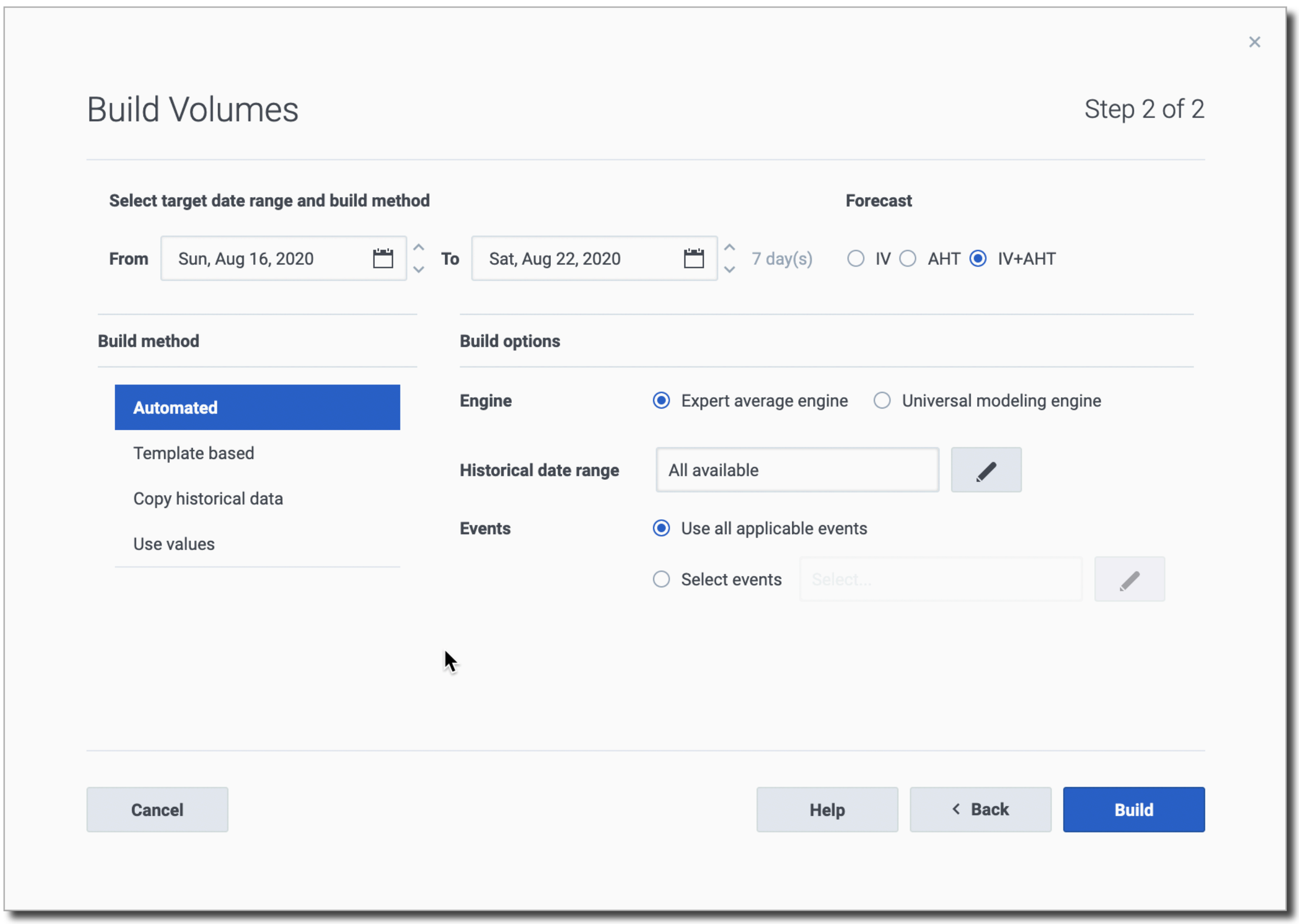
1. Expand business units (if any) to display their sites and multi-site activities, and expand sites to display their activities.
2. Select all of the activities that you want to be included in this volumes forecast, taking note of the following:

- You can select multiple activities to build volume forecasts in **batch** mode when configuration information for each activity is identical. If you want to use different historical data or build methods for certain activities, build the volumes for those activities separately.
- You can add activities to a forecast after it has been created.

3. Click **Next** to continue.
   In Step 2 of the wizard, you'll select a target date range and data build method (see next procedure).

Step 2: Selecting target date range and data build method

In step 2 of the Build Volumes wizard, when you are selecting the build method, the dialogs that open next depend on the method you select. See the graphics in Choosing a build method.



Defining the build volumes data

1. Select the **Start date** and **End date** for this build.
2. Select the statistics: **IV**, **AHT**, or **IV+AHT**.

3. Select a build method. If you select:
    - **Automated** (default), complete this procedure.
    - **Template based**, complete this procedure.
    - **Copy historical data**, complete this procedure.
    - **Use values**, complete this procedure.
4. When you have finished populating all dialogs, click **Build**.
5. When the build process is complete, click **OK**.

> Tip
> Clicking **Cancel** during the build process closes the wizard but does not necessarily prevent volumes from being built.

Next steps:

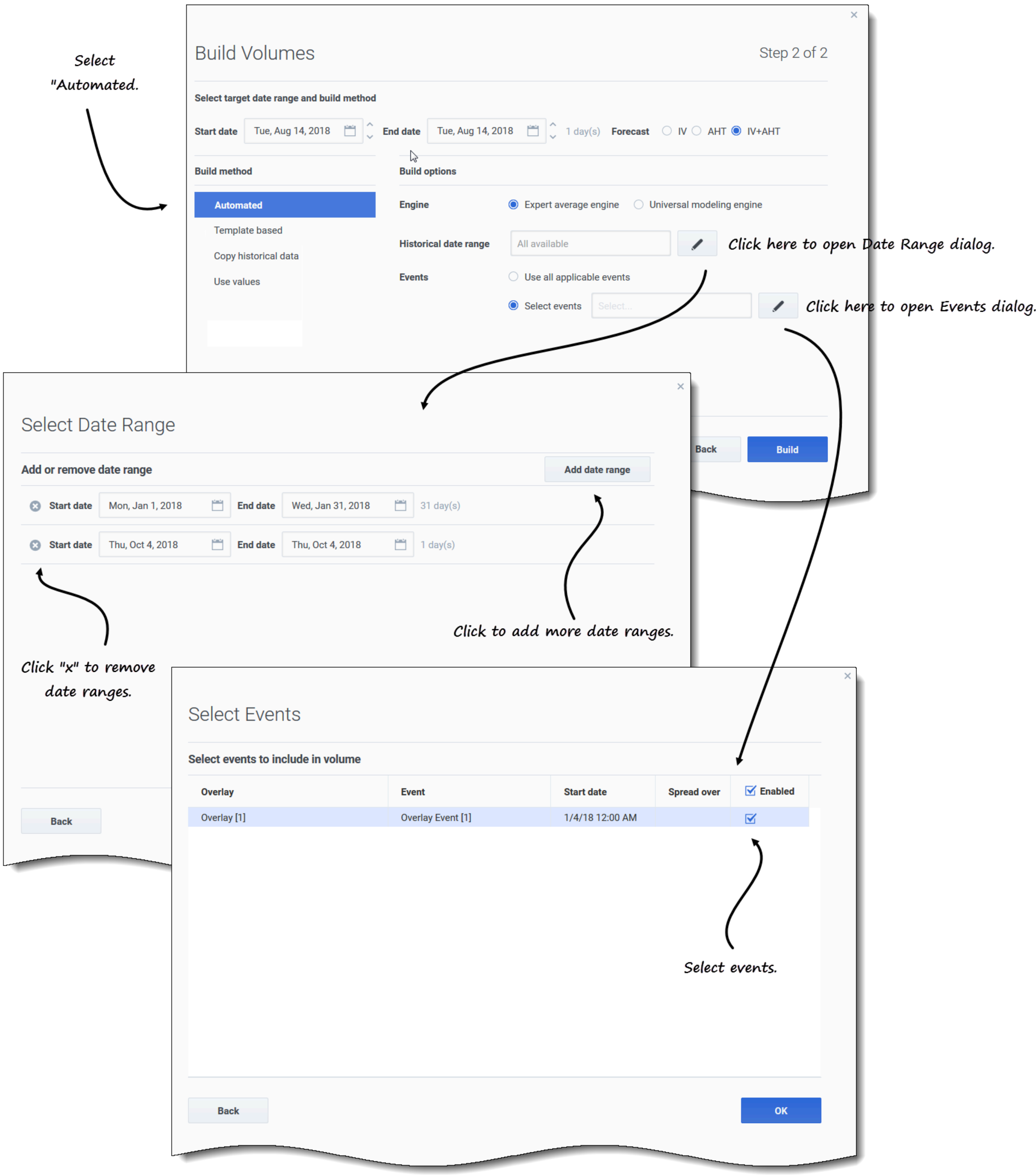
- Build staffing into the scenario. For details, see Building staffing data.
- Publish the scenario to the Master Forecast. For details, see Publishing the forecast scenario.

Choosing a build method

WFM provides different methods to build forecast data, enabling you to choose the one that is most appropriate for your environment. They are described in this topic, along with procedures to help you apply the appropriate settings for the method you choose.

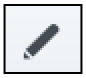
Automated

This is the default build method (in Step 2 of the Build Volumes wizard) and an appropriate selection if you want to use one of two WFM automated algorithms: Expert Average Engine and Universal Modeling Engine.



Using the Automated build method

1. Select either **Expert average engine** or **Universal modeling engine**.

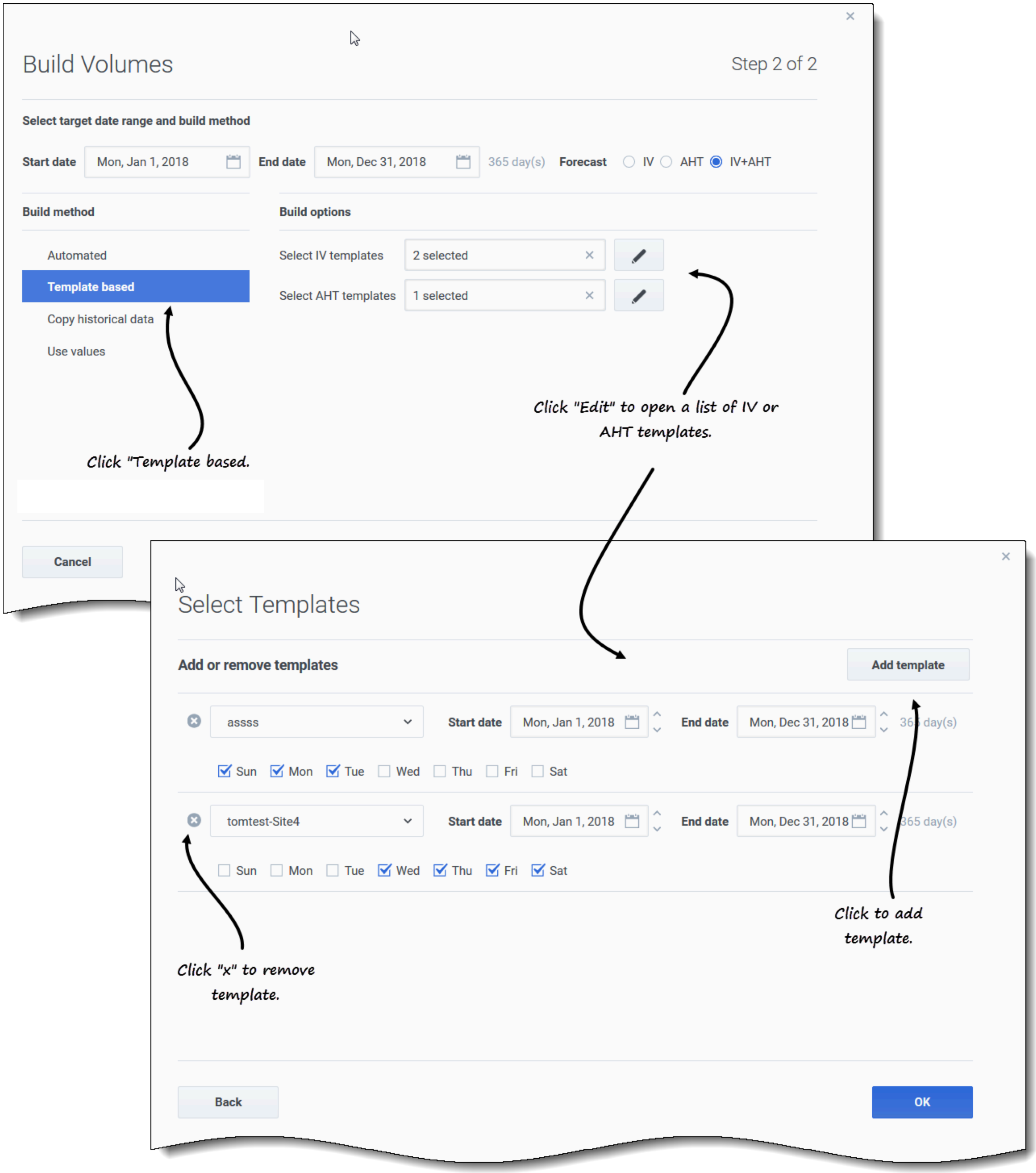
2. For **Historical date range**, choose to:
    - Do nothing and retain the default **All available**.
    - Click **Edit**  and select the date ranges.
      If you click Edit, the Select Date Range dialog opens. If there is no historical data for the specified activity, the dialog does not open and WFM displays a validation message.
3. Click **Add date range** to add one or more date ranges, modifying them as necessary and then, click **OK**.
   By default, WFM displays the start and end date of the historical date range for the selected activities.
4. Click one of two radio buttons:

Procedure continued...

1. If you choose:
    - **Use all applicable events**, WFM includes all events associated with the selected activities for the specified statistic within the scenario date range/historical date range.
    - **Select events**, click **Edit**.
      The Select Events dialog opens.
2. Click each event's check box if it should be considered for calculation and then, click **OK**.
   Clicking the top-most check box selects all events in the list.
   Read more about events in Using overlay events in forecasts.
3. Click **OK**.
4. When the wizard returns to Step 2, click **Build**.
5. When the build process is complete, click **OK**.

Template based

This is an appropriate selection in Step 2 of the **Build Volumes** wizard if you want to build a forecast using preconfigured interaction volume (IV) and/or average handling time (AHT) templates. You can also use template-based forecasting to apply a percentage growth rate to historical data.



Using the Template based build method

1. Click **Edit** to select an IV template, AHT template, or one of each.

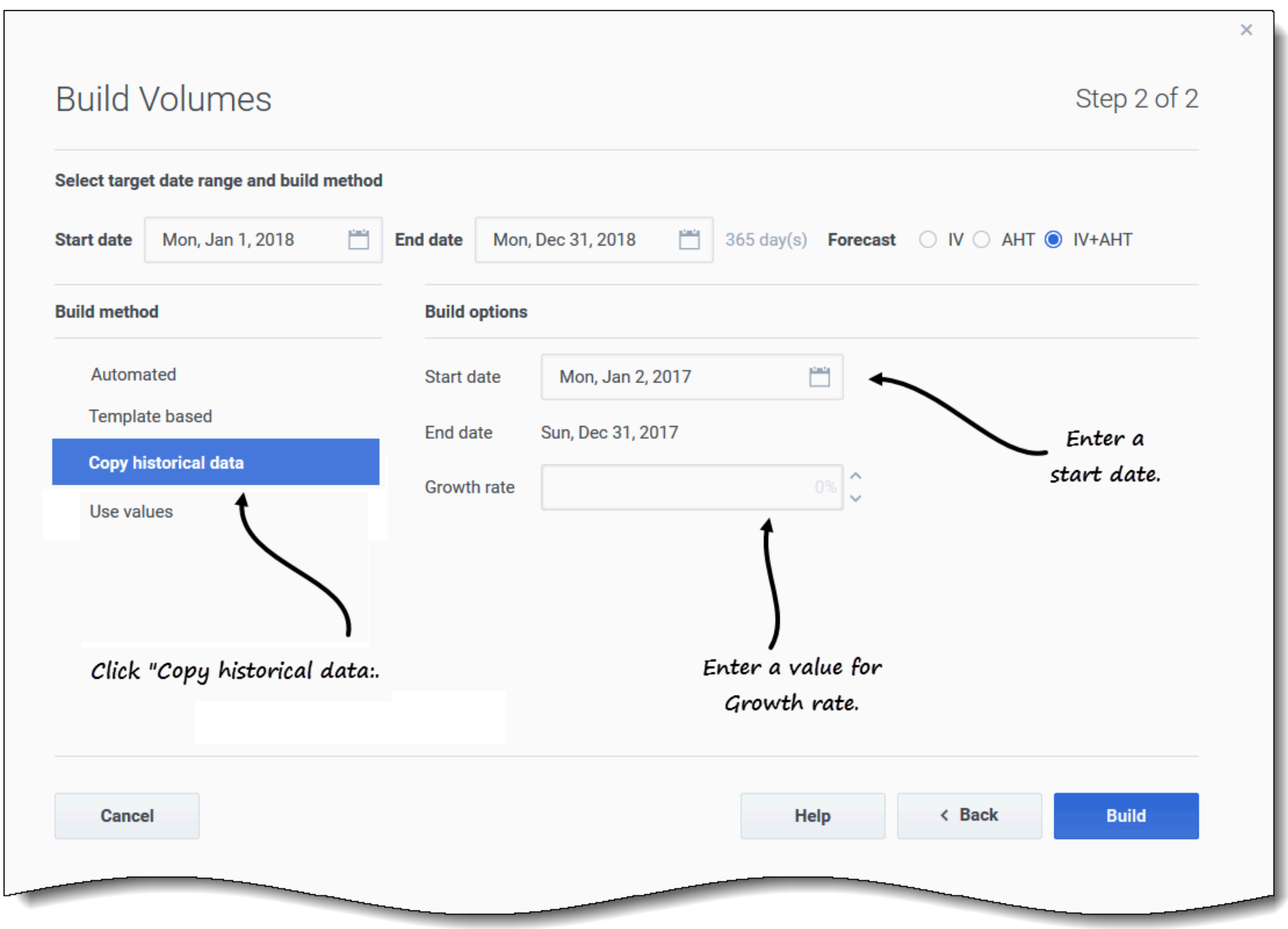
2. In the **Select Templates** dialog, click **Add template** to add 1 or more templates
3. Click the down arrow in the **Template name** field to select a template from a list.
4. Click **OK**.
5. When the wizard returns to Step 2, click **Build**.
6. When the build process is complete, click **OK**.

It's best to use template-based forecasting in contact centers with very stable interaction patterns or for activities that can be manually forecast, such as back-office work, media interactions, or outbound campaigns.

For detailed information about templates, and instructions on how to create them, see Templates.

Copy historical data

This is an appropriate selection (in Step 2 of the Build Volumes wizard) if you have some historical data, but not enough to use the Expert Average or Universal Modeling engines. You can combine the historical data with templates, which fill in gaps in the historical data.



Using the Copy historical data build method

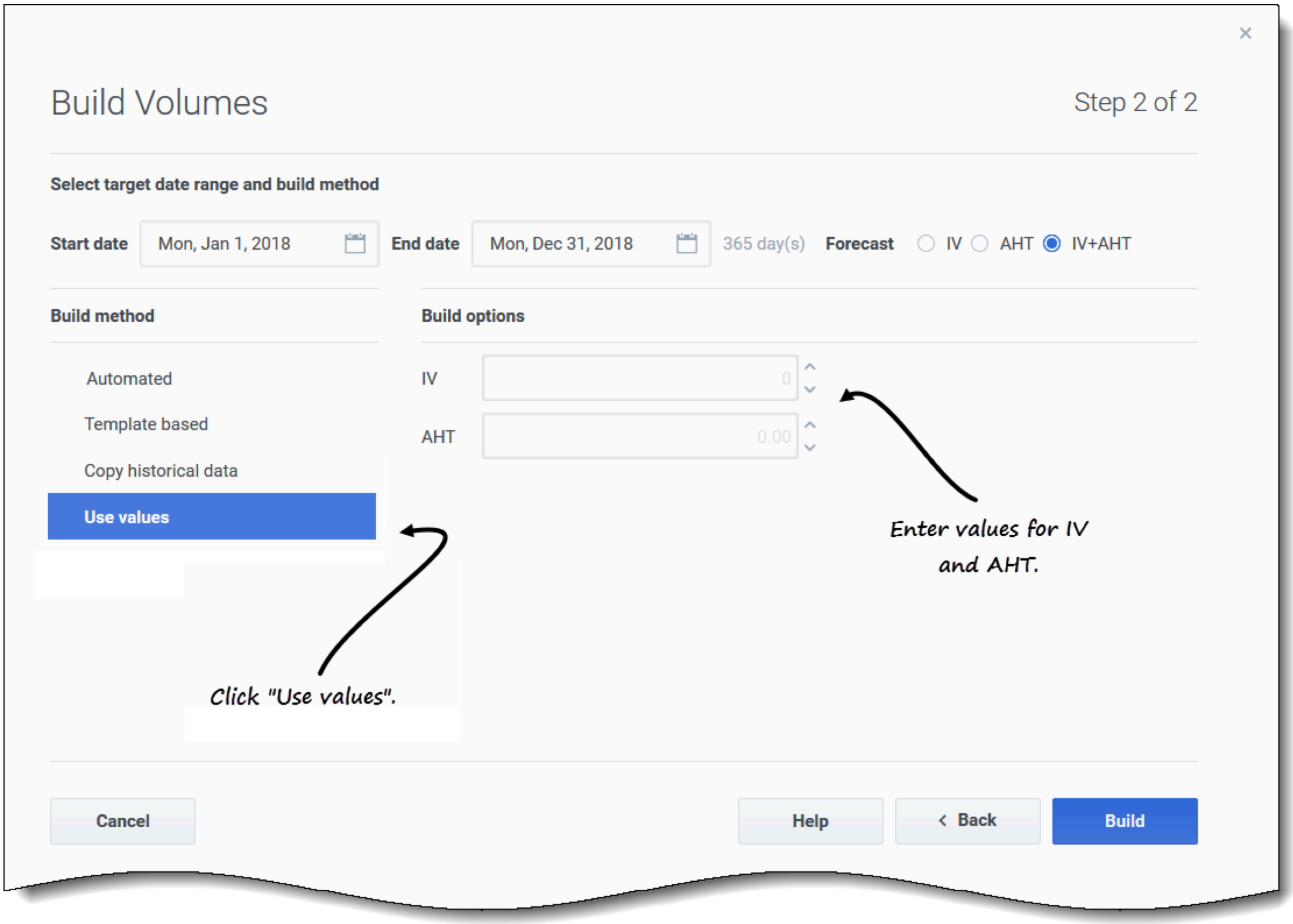
1. Enter a **Start date** or select one by clicking the **Calendar** icon.
   Read more about the start and end date in Using historical data in forecasts
2. Enter a percentage for **Growth rate** or select one by using the up/down arrows.
3. Click **Build**.

If you select this build method and a selected activity does not have historical data, you'll see the following error message after clicking **Build**: *There is no historical data for the parameters specified*.

Use values

This is an appropriate selection (in Step 2 of the Build Volumes wizard) if your site activity load is very regular. It applies a specific interaction volume or AHT to each time interval in the scenario.

- **Interaction Volume and AHT**—Both the **IV** and **AHT** fields are enabled and entered values are used for each cell in the forecast.
- **Interaction Volume**—Only the **IV** field is enabled. The values entered represent the number of interactions per timestep (for example, the number of interactions per 15-minute interval).
- **AHT**—Only the **AHT** field is enabled. The values entered represent the average handling time, in seconds.



Using the Use values build method

1. Enter a value for **IV**.
 This value represents the number of interactions per timestep in the forecast. For example, the number of interactions per 15-minute interval.
2. Enter a value for **AHT**
 This value represents the average handling time, in seconds.
 If you enter a value in both IV and AHT, these values are used for each timestep in the forecast..
3. Click **Build**
4. When the build process is complete, click **OK**.

Using WFM's automated algorithms

When using the Automated build method, WFM provides two automated algorithms from which to choose.

Expert Average Engine

This engine uses the statistical analysis of historical data to produce day-of-week, weekly, and (if sufficient historical data exists) yearly trend patterns. It requires at least one full week of historical data. For high-quality day-of-week and weekly results, Genesys recommends that you use a minimum of six weeks of data.

Expert Average Engine applies events in a linear fashion, and this linear perspective smooths out the impact of events across the forecast. Therefore, this selection is best suited to contact centers with fairly stable interaction patterns.

Universal Modeling Engine

This engine uses a complex algorithm to identify trends and patterns in historical data, which it then uses to create a forecast. It requires one year's worth, or more, of historical data. In its analysis of historical data, this engine disregards days that contain special events if those events don’t occur during the forecast period, thereby eliminating any misleading "noise" from the forecasts. However, if a special event does occur during the forecast period, the Universal Modeling Engine uses the historical data to calculate the impact of the event and applies it to the baseline forecast.

This selection is best suited to sites with a large quantity of high-quality historical data.

Using historical data in forecasts

The **Volumes** view displays Interaction volumes (IV) within imported or collected historical data. See the option to **Compare with previous years** in Setting the data display properties.

WFM enables you to define the historical data time range when building volumes. When setting the start date, select the same day of the week as the forecast scenario's first day. For example, if the target start date is a Tuesday, the historical data start date must also be a Tuesday.

The default date range is dependent on the the target date range and statistic you selected in the wizard, and changes based on of these values. For example, There is one date range for AHT data and one for IV data. If you select **IV+AHT** WFM combines the date ranges, using the earliest historical data start date and latest historical data end date of the two.

When setting the end date, keeping the following information in mind:

- If you selected the **Copy historical data** build method, this field is disabled. The same historical start and end dates are used for all activities selected for this forecast.
- Remember that redistributing events does not impact historical data, only the forecast.
- If you entered a value in the **Growth rate** field, the historical data is increased or decreased by that specified percent. The value cannot be less than `-99.99`%.

If the build method is **Automated** using Expert Average Engine or Universal Modeling Engine, you can add additional historical periods to the list, to specify the exact historical data that you wish to be used (and ignore any data that you wish not to be used).

You can clear selected date ranges by clicking the **x** in **Historical date range** field. This action clears previous selections, but retains the defaults. For all build methods, clicking **Edit** beside the **Historical date range** field generates an error message if no historical data exists for the selected activity/statistic.

Using overlay events in forecasts

You must create events and assign them to activities in the **Forecast** > Overlays view, before you can add them to a forecast scenario

An *overlay* is anything that can be expected to affect the daily interaction volume of the enterprise and, therefore, staff and schedule requirements. An *event* is a specific instance when an overlay is in effect.

Adjust the **Initial Impact** and/or **Ending Impact** value, if appropriate. The default values are based on the event's configuration. If the event is configured to disregard historical data, you cannot adjust these values here. You must change the configuration using the Overlays view.

Click **Distribution** to view and optionally change the distribution of the selected overlay. WFM Web calculates the volumes and displays them in the Volumes view. An error message appears if WFM Web cannot complete the calculation (for example, if the historical data contains too few timesteps to cover the scenario's activity hours).

Redistributing events does not impact historical data, only the forecast.

You can clear selected events by clicking the **x** in **Select events** field. This action clears previous selections, but retains the defaults. If the selected activity does not have overlay events, you'll see the message *You do not have any overlay events*.

Adjusting and splitting volumes

Contents

Set parameters in the forecast scenarios properties to adjust and split the volumes data.

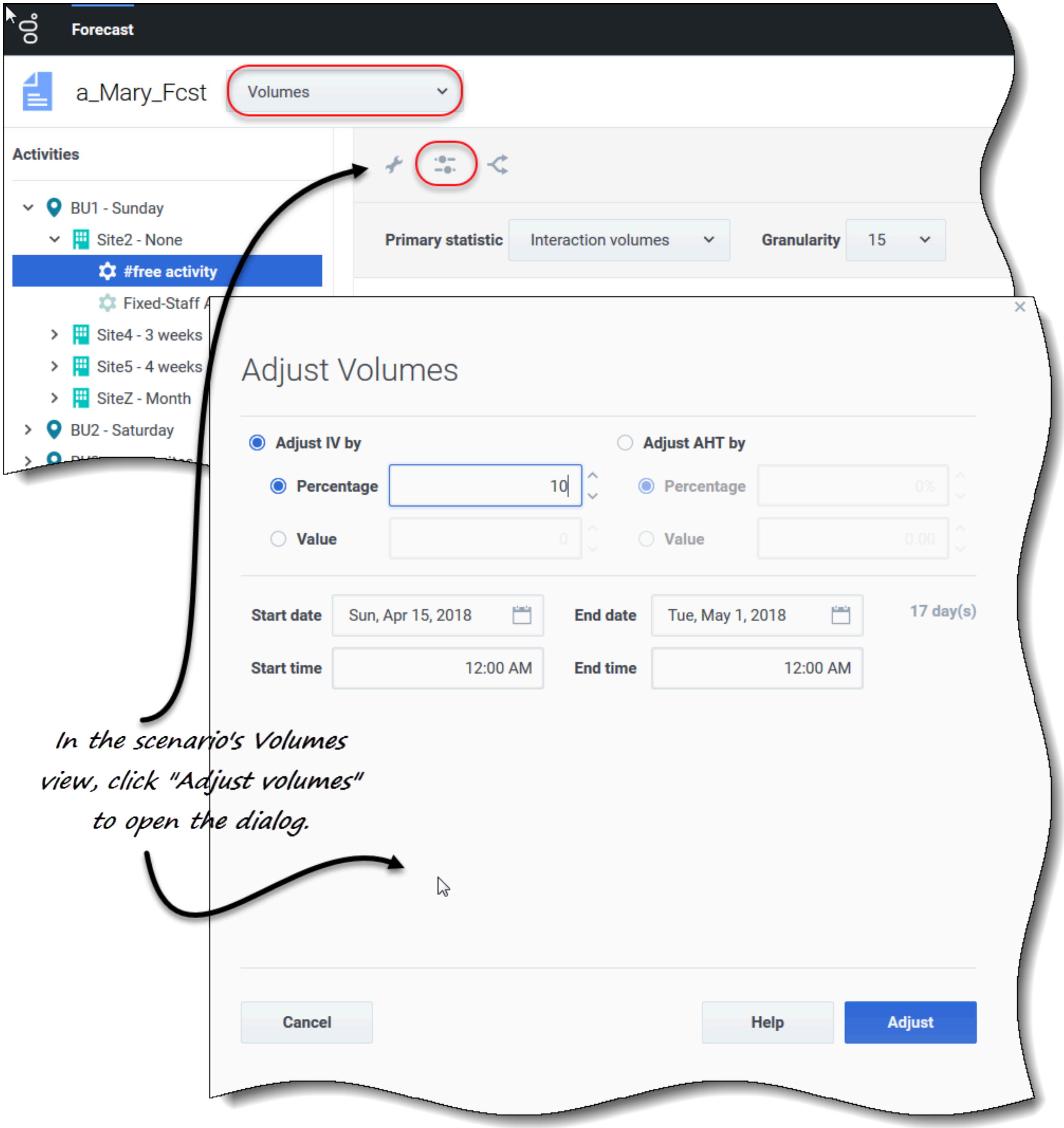
Related documentation:

-

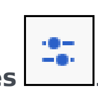
In Workforce Management (WFM), you'll open a forecast scenario and use the buttons in the **Volumes** view toolbar to adjust and split volumes.

Adjusting volumes within a date range

Use the **Adjust Volumes** wizard to adjust interaction volumes, the average handling time (AHT), or both in a Scenario Volumes view.



Adjusting the scenario's volume

1. In the **Volumes** view toolbar, click **Adjust Volumes** .
2. In the open dialog, click the radio button for the primary statistic you want to adjust, either **Adjust IV**

by or **Adjust AHT by**

3. Decide how (and by how much) to adjust the statistic in the grid:
   - Select **Percentage** and enter a number by which to adjust existing values or use the up and down arrows to select a number.
     Valid values range from `-99%` to `999%`.
   - Select **Value** and enter a number (or select one using up/down arrows) that will be the total value by which to adjust the existing values that fall within the date and time ranges set in the next few steps in this procedure.

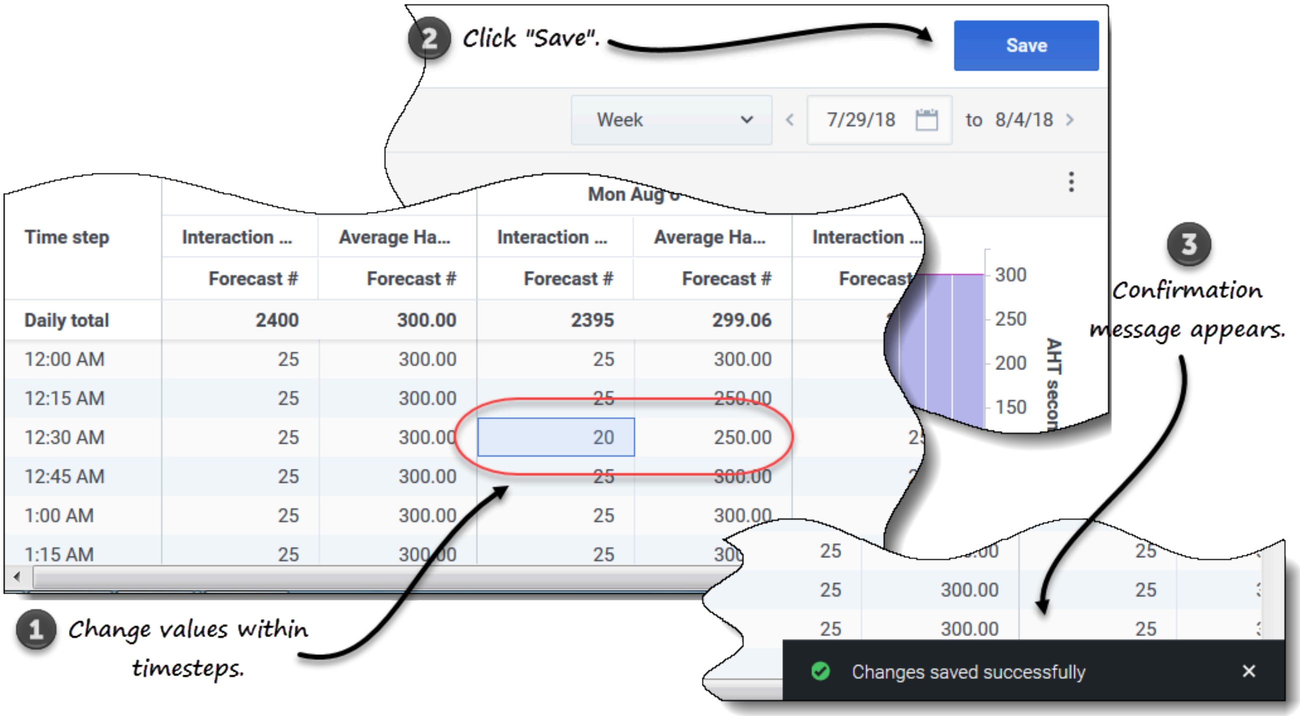
Procedure continued...

1. To adjust values in the grid, specify the date range by entering a start and end date or by selecting them from the calendar
   The Start date range can be any date equal to or later than the date in the upper right of the Volumes grid; `00-23` hours. The End date range can be any date later than the Start date; `00-23` hours.
2. Specify the time step by entering or selecting values in the **Start time** and **End time** fields.
   The start and end time must be in 15-minute increments. For example, `00`, `15`, `30`, or `45` minutes.
3. Click **Adjust**.
4. When the confirmation dialog appears, click **OK**.

Note that you can click **Cancel** at any time to cancel this action and close the **Adjust Volumes** dialog.

Adjusting volumes within time steps

You can adjust interaction volumes, the average handling time (AHT), or both in a Scenario Volumes view by changing the values directly, in time steps.



Adjusting volume in time steps

1. Open a scenario to the **Volumes** view.
2. In the **Objects** pane, select a activity or multi-site activity that has volumes data.
3. Select the **Granularity** (**15**, **30**, **60**) and the interval (**Day**, **Month**, **Year**) of data you want to see.
4. In the grid, double-click the cell for the time step you want to change (IV, AHT or both).
5. Enter the new values, as many as necessary.
6. Click **Save**.
   The message *Changes saved successfully* appears in the bottom-right corner of the view.

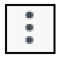
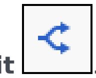
If the changes were not saved, the message *Failed to save changes* appears. Try entering different values.

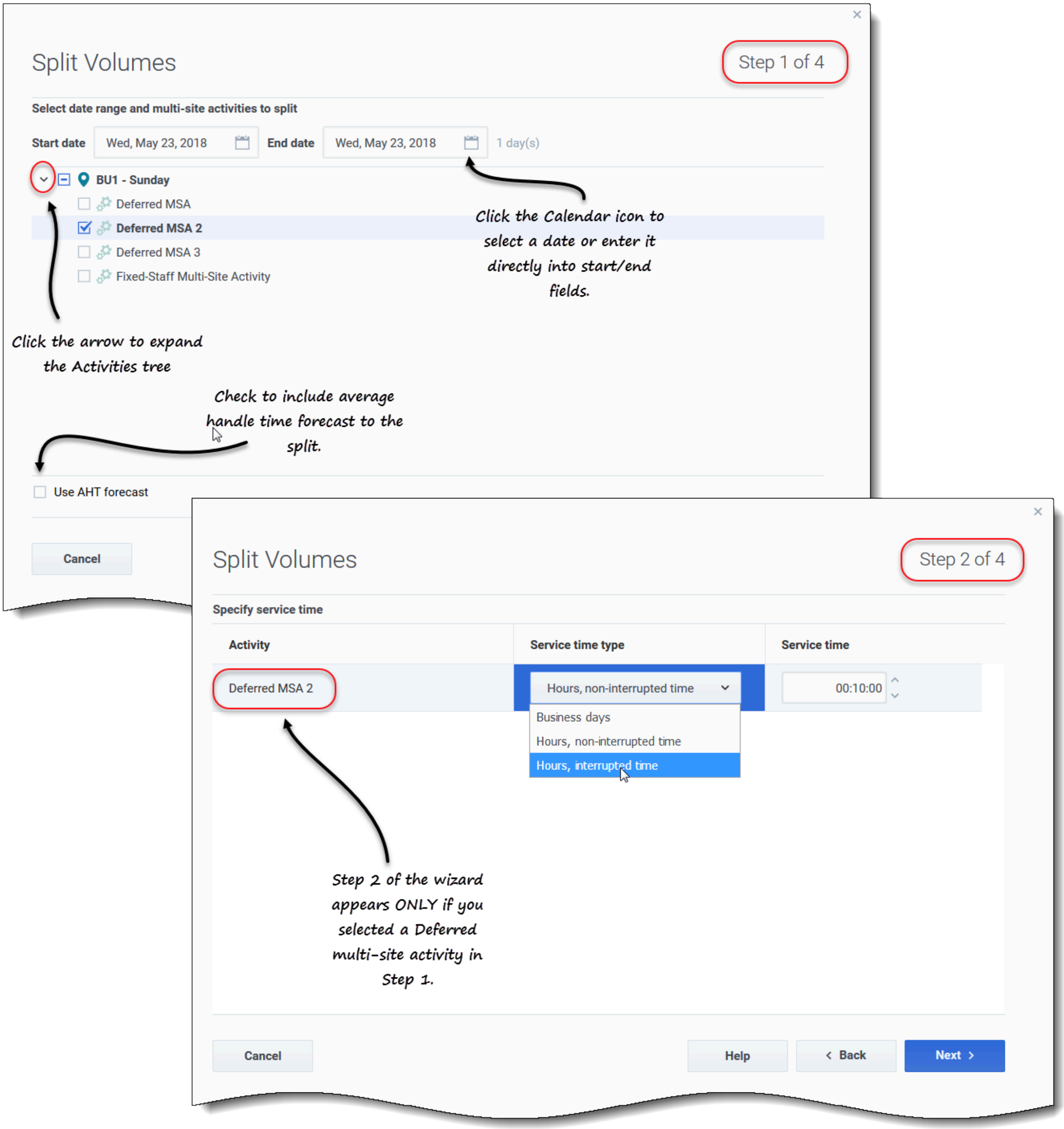
Splitting Volumes

Use the **Split Volumes** wizard to split a forecast scenario's volume between the activities contained within a multi-site activity. In the procedures below, click the links in a specific setting to find more information about it.

To split a scenario's volume:

1. In the **Forecast** > **Scenarios** view, select a scenario.

2. Click the scenario's **Actions**  menu and select **Open**, or select the scenario's check box and click **Open**  in the toolbar.
3. In the **Activities** pane, select a site that contains multi-site activities, and click **Split** .
   The Split Volumes wizard opens at Step 1.



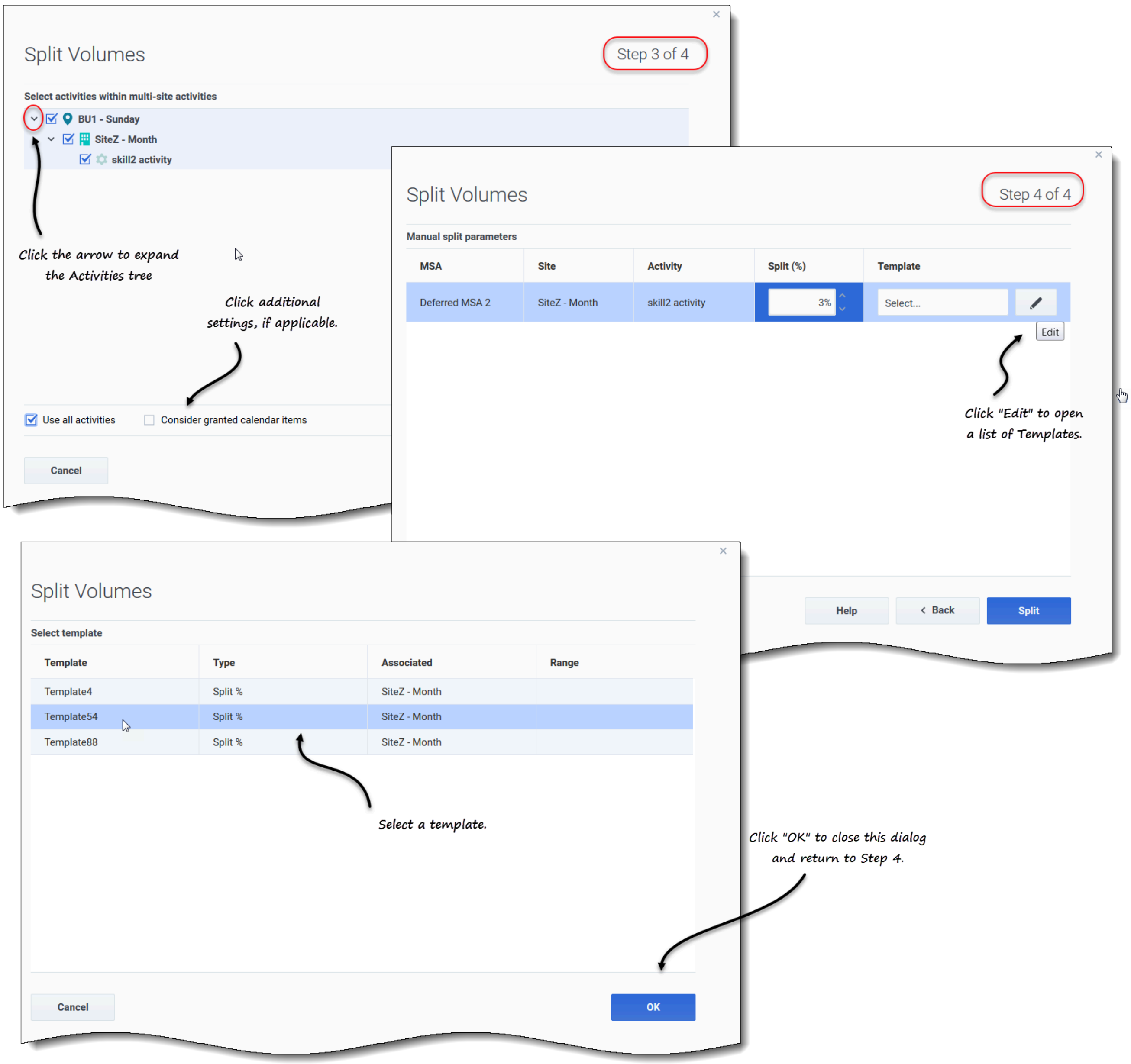
Step 1: Selecting the date range and MSA

1. Enter a date range in the **Start date** and **End date** fields.

2. Expand the activities tree and select the check box beside the multi-site activities you want to split.
   You can select several multi-site activities within the same business unit.
3. To include the average handling time forecasts in the split, select Use AHT forecast and click **Next**.
   If you selected multi-site activities of type Deferred, the wizard's Step 2 opens.
   If you selected multi-site activities of any other type, the wizard skips Step 2 and opens at Step 3.

Step 2: Selecting the Service time

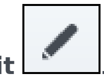
1. For each deferred multi-site activity, select a Service time type in drop-down list:
   - Business days
   - Hours, non-interrupted time
   - Hours, interrupted time.
2. Enter a value in the Service time field and click **Next**.
   Step 3 of the wizard opens.



Step 3: Selecting activities within MS

1. Expand the activities tree to select activities within the multi-site activities.
2. Alternatively, select the **Use all activities** to include all activities in the specified site. See more below.
3. Select the **Consider granted calendar items** check box, if you want WFM to consider existing Calendar items when splitting the interaction volume among activities.
4. Click **Next**.
   Step 4 of the wizard opens.

Step 4: Splitting parameters

1. Optionally, enter a value for Split (%), or use the up/down arrows to select a percentage.
2. Or, in the Template column for each multi-site activity, select **Edit** .
   A dialog containing a list of templates opens.
3. Choose a template and click **OK**.
   The wizard returns to Step 4.
4. Click **Split**.
   WFM splits the forecast's volume.
5. When the confirmation dialog opens, click **OK**.
6. After reviewing the messages, click **OK** to close the dialog.
   Review the split volumes in the table or graph.

If you enter a split percentage and WFM cannot process the split as expected, the **Splitting Results** dialog opens, displaying a list of error messages in table format with the following columns: **Business unit**, **Activity**, **Unsplit IV**, and **Message**.

In any one of the steps in the **Split Volumes** wizard, click **Cancel** to quit the wizard and discard all settings.

More about the Split Volumes settings

This topic provides detailed information about the settings in the Split Volumes wizard.

Use AHT forecast

If you select **Use AHT forecast** and you select activities that do not have an AHT forecast, the resulting value for each of these activities will be `0` for the timestep(s) where `AHT=0`.

If you do not select **Use AHT forecast**, the multi-site activity AHT is assigned to the local activities and the local activity AHT is overwritten. If there is no multi-site activity AHT, the local activity AHT is deleted.

Service time type

A drop-down menu with the following values:

- **Business days**—The number of business days, including the current day during which the interaction arrived. If the service level = 100% within one business day, then all interactions must be serviced on the same day they have arrived, according to open hours.
- **Hours, non-interrupted time**—When an interaction is waiting, while the activity is closed, the time is still being counted in the service level calculations.
- **Hours, interrupted time (default selection)**—When an interaction is waiting, while the activity is closed, the time is not being counted in the service level calculations.

Service time

The nature of this control depends upon the granularity of your selection in the **Service time type** field.

- If you select hours, you must specify hours, minutes and seconds. The value must be greater than `0`.
- If you select business days, you must specify an integer that is greater than `0`.
- If you switch the granularity from hours to business days, WFM Web resets the time value to `0`.

Select activities within multi-site activities

Select the local (target) activities into which you want to split the multi-site activities. You can select several target activities, but note the following constraints:

- If you selected **Use AHT forecast** in Step 1 of the wizard, then you cannot select target activities that do not have at least one time step with at least one AHT value greater than `0`.
- If you select **Use all activities** in Step 3 of the wizard, when WFM splits data for interaction volumes, AHT, and availability of agents for the selected activities in the scenario, it takes into account the values for all activities in the specified business unit, whether selected or not.
  Activities that are not selected are not split; WFM Web simply considers them when determining the proportions that are split to each selected activity. This option does not affect the split result if there are no shared multi-skill agents who work on both selected and unselected activities.

Split % and templates

Splitting volumes and using templates are optional in Step 4. If you do not want to do either, simply click **Split** in the dialog without changing the settings.

If you choose to, enter a split percentage for each of the activities within the multi-site activities, or click in the **Edit** to select and use a template. If you use both a split percentage value and a template for any activity:, WFM uses:

- The split percentage value for empty time steps
- The template values for all non empty time steps

You can specify a percentage to allocate the volumes from a multi-site activity to each child (site) activity. An interval can be the entire forecast scenario that includes a week, day, and time step.

At the interval level, when a percentage is specified that is greater than the time step, WFM propagates the percentage to the remaining time steps. If a percentage is not specified for certain child activities, WFM splits the remaining volumes to those activities, splitting them by availability. You can specify a different percentage value for each interval.

Staffing in scenarios

Contents

Learn about the types of data you'll find in the Staffing grid, how to navigate it, and customize it.

Related documentation:

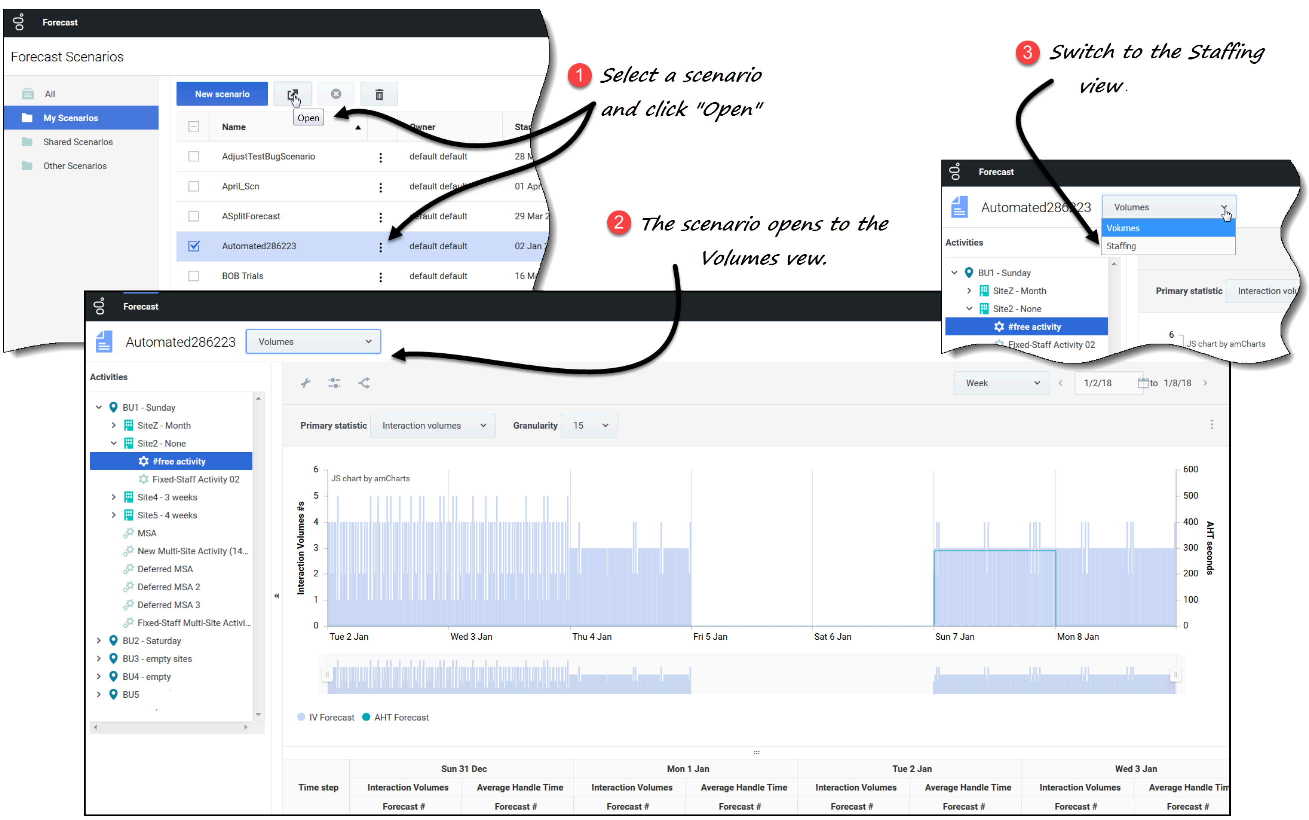
-

In Workforce Management (WFM), you'll use the **Scenario Staffing** view to define or edit a forecast scenario's calculated and required staffing. *Staffing* refers to the number of agents that are required to meet a given set of requirements for a specific time range.

This view provides standard date-selectors and a grid that shows staffing levels for days or timesteps.

Viewing the staffing data

Open the **Staffing** view by using the scenario's drop-down menu (see below). (Scenarios open to the **Volumes** view by default.)



Opening the Staffing view

1. In the **Forecast** module, select **Scenarios**.
2. Select a scenario from the list in the data pane, and click **Open** in the toolbar or in the **Actions**  drop-down menu.
   The Volumes view opens by default with the scenario name in the top-left corner of the window.
3. Click the scenario's drop-down menu and select **Staffing**.
4. In the **Objects** tree, expand a business unit, then a site to select an activity or multi-site activity.
   The view displays a graph above a table or grid, each containing the same statistics, and controls that set the data display properties for the graph and table.

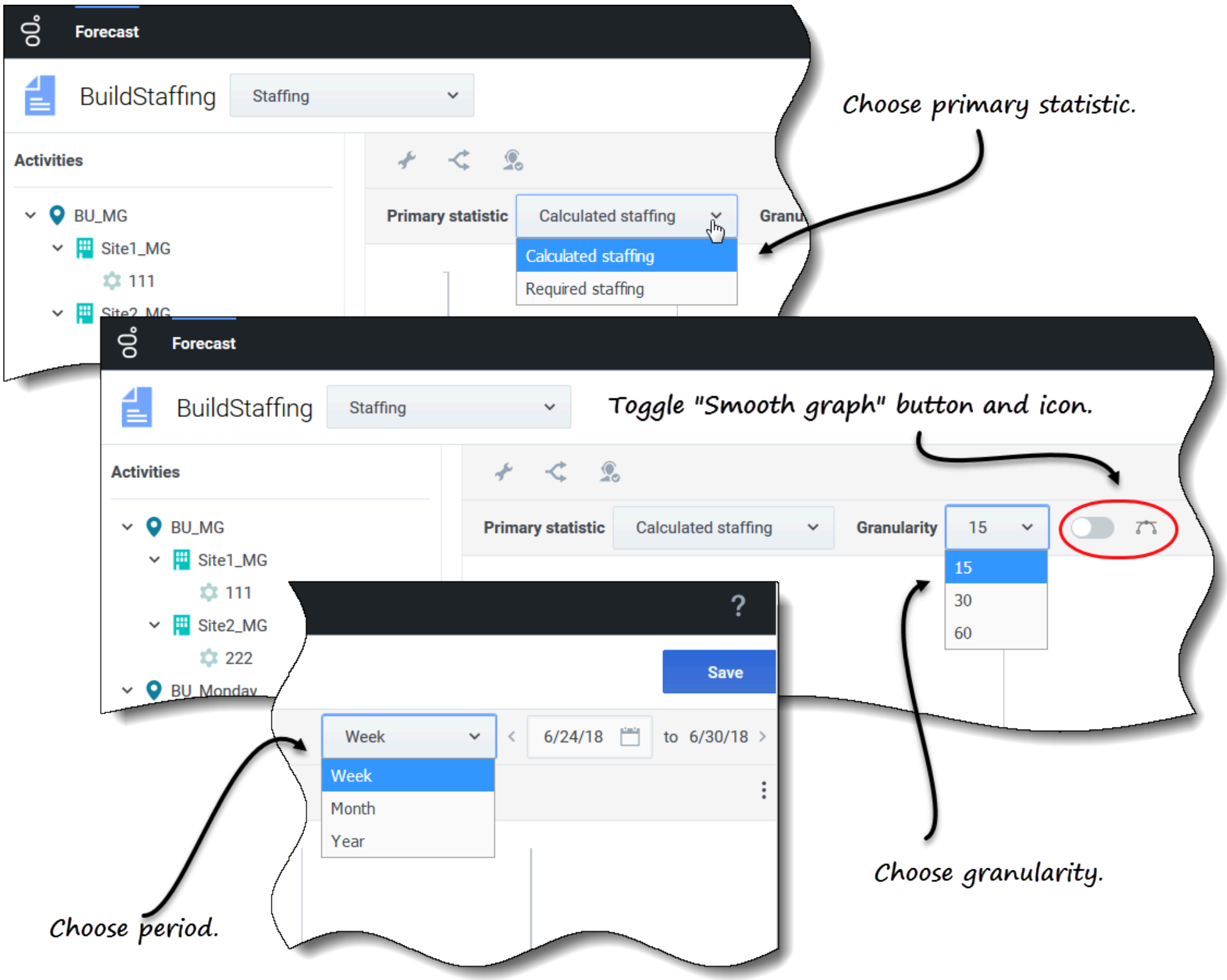
If you have not selected an activity, you'll see the message *Select an activity within the nested tree to load staffing*. If you still do not see any data, you may need to adjust the Period, Granularity, or date-selectors at the top of the window to reflect those used for the forecast.

The grid displays open hours for selected site activities and multi-site activities in a similar way.

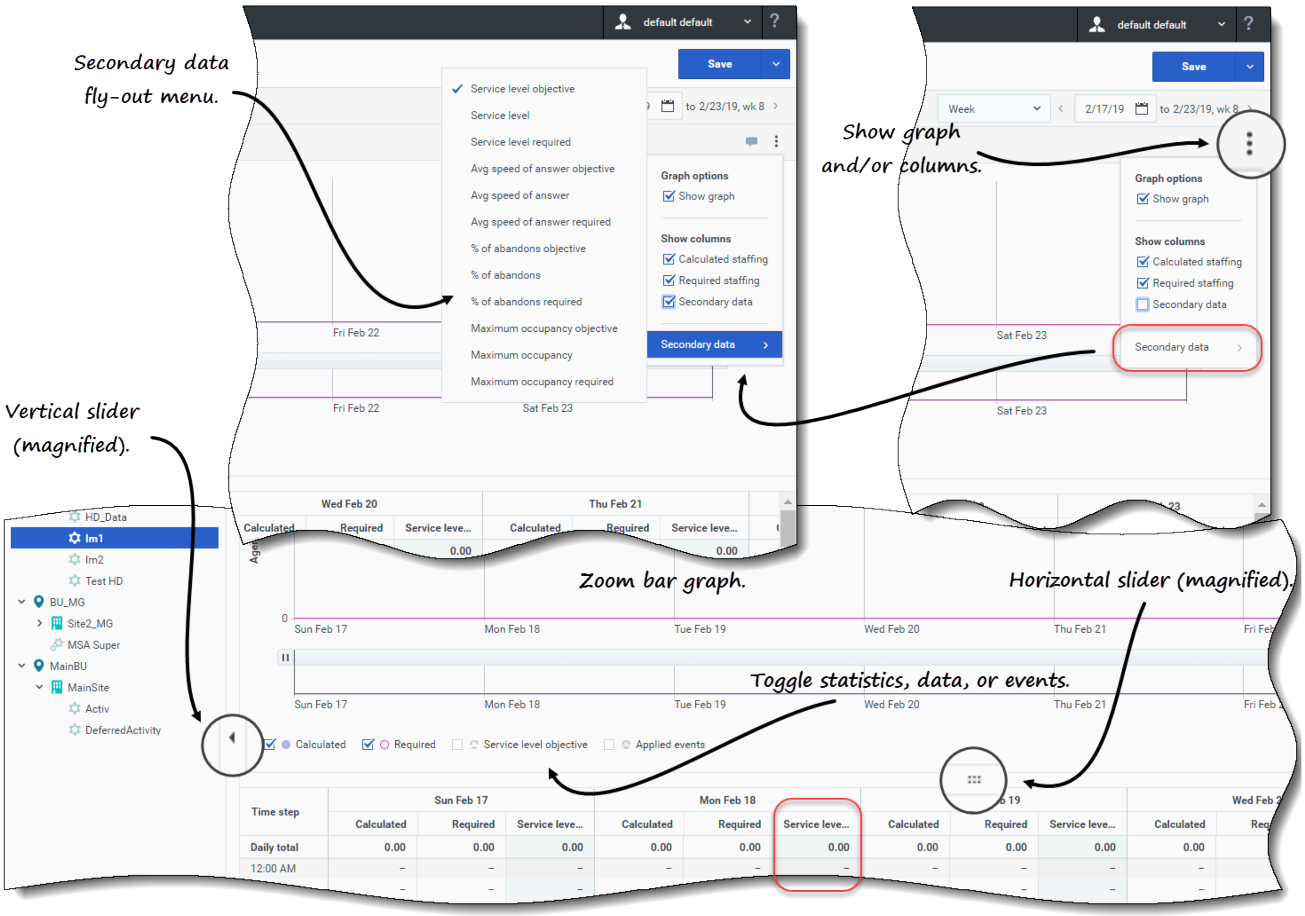
You can also view, add, and edit the volumes or shrinkage data in opened scenarios, by selecting Volumes or Shrinkage from the drop-down menu near the scenario name.

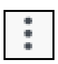
Setting the data display properties

In this view, the graph's y-axis represents the number of agents; the x-axis represents the selected period (week, month, year). Use the following controls to customize the data display in the graph and table:



- **Primary statistic** *drop-down list*—Select the statistic that will be displayed as primary, by selecting **Calculated staffing** or **Required staffing**. The primary statistic displays as a bar in the graph and the secondary statistic displays as a red line.
- **Period** *drop-down list*—Change the period or time range for the graph and grid by selecting **Year**, **Month**, or **Week**.
- **Granularity** *drop-down list*—Adjust the granularity to **Day** if you selected **Month** or **Year** in the **Period** drop-down list. Adjust the granularity to **15**, **30**, or **60** (minutes) if you selected **Week** in the **Period** drop-down list.
- **Date range**—Use the date-selectors (top-right portion of the view) to switch to a different period within the scenario forecast's date range.



-  **Actions** *drop-down menu*—Click this icon to change the graph and/or grid:
    - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also Sliders.
    - **Show columns**—Show/hide data columns in the grid by selecting/clearing the **Calculated staffing**, **Required staffing** or **Secondary data** check boxes.
    - **Secondary data**—Hover over this item to open a fly-out menu that lists all of the secondary data types that can be displayed in the graph and grid.
      If Secondary data is checked in the Show columns section, the data type that you select from the fly-out menu is the name of the column that displays in the grid and the check box below the graph, and it displays as the y-axis statistic. To learn more, see Viewing secondary data.

  Click anywhere in the view to close the drop-down menu.

- **Toggles**—Below the graphic, toggle a statistic (**Calculated**, **Required**, **Secondary data**), or Applied Events on or off in the graph. Selecting the check box toggles it on, and clearing the check box toggles it off. When checked, the radio button is:
    - solid blue for **Calculated**.
    - outlined in magenta for **Required**.

- outline in a broken dark blue line for **Secondary data**.
- outlined in a broken yellow line for **Applied events**.

Using the graph, zoom bar, and sliders

Watch the video to see a demonstration of the features in the Staffing view, shown in the graphics above and described here:

Link to video

-  **Smooth graph** *button* and *icon*—Edit the bar graph (using the button or icon) when an activity is selected in the **Objects** pane and this feature is toggled on.
  The bars representing the primary statistic come to the front of the graph and become bold, the line representing the secondary graph fade to the background, and the x-axis zoom is disabled.
  Clicking any bar in the graph reveals a handle, enabling you to drag the bar up or down. The corresponding cell in the grid is highlighted and the value increases or decreases as you move the bar graph up and down. Similarly, if you click any cell in the grid and change the value, the corresponding bar graph changes accordingly.
  Dragging the bar to the upper limit of the y-axis increases the y-axis scale, causing the remaining bars to scale down proportionally. If the bars are too narrow to select easily, switch your view to another time period or use the zoom bar.

- **Sliders**—Drag the vertical slider left/right to show/hide the graph, zoom bar, grid and/or **Objects** pane. Click the arrows in the vertical slider to resize the **Objects** pane. Drag the horizontal slider up/down to show/hide the graph and/or grid.
- **Zoom bar**—Use the zoom bar handles to narrow or widen the focus in the graph, by sliding the handle left or right. You can zoom to a minimum of one day. After narrowing the focus, place your cursor over the graph and change the range of the zoom by dragging and dropping it to the left or right. For example, if you narrow the focus to Sunday, Monday, and Tuesday, but want to change it, drag and drop the zoom to the right to Tuesday, Wednesday, Thursday.

Reading the data

The table provides columns that display the following statistics:

- **Daily total**—If you select the period **Week**, this row shows daily totals for **Calculated** and **Required** staffing.
- **Weekly total**—If you select the period **Month**, these columns show the weekly totals for **Calculated** and **Required** staffing.
- **Monthly total**—If you select the period **Year**, these columns show the monthly totals for **Calculated** and **Required** staffing.
- **Date/Time step**—Identifies the range of dates or timesteps in this row. The column name and contents will differ, depending on the period and granularity you selected above.
- **[Days or Dates]**—If you select the:

  - **Week** date range—Each group of columns indicates one day.The top row shows daily totals measured in full time equivalents (FTE). Each lower row shows statistics for one timestep on that date.
  - **Month** date range—Each group of columns shows staffing for one full day.
  - **Year** date range—Each group of columns shows staffing for one full day.

  Timestep duration depends on the granularity that you selected above.

- **Calculated**—Shows the calculated number of agents for each day measured in full time equivalents, or for each timestep measured in single skill equivalents. You can edit the cells' contents, replacing the displayed values with whole numbers.
- **Required**—Shows the required number of agents for each day measured in full time equivalents, or for each timestep measured in single skill equivalents. You can edit the cells' contents, replacing the displayed values with whole numbers.

WFM populates Calculated staffing when you build staffing, by using the Build Staffing wizard. Required staffing is a user-defined data series that you build, by using the Required Staffing wizard. It can be populated based on data from the calculated staffing data series, or you can copy and paste data from an external spreadsheet into these columns. When building schedules, the Use required setting lets you base a schedule on calculated or required staffing. This allows you to take the staffing forecast that WFM provides and adjust it in a user-defined way.

> **Tip**
>
> You can copy and paste data between the grid and a spreadsheet.

What are full-time equivalents?

Full Time Equivalents is a standard measurement used within contact centers that allows the analyst to do an "apples-to-apples" comparison of the number of agents required to handle the expected interaction volume, across activities that may have different open hours, different planned overheads, and so on. WFM provides the number of FTEs for informational purposes only. It does not affect the Intra-day staffing requirements that WFM produces, which is the basis for building schedules.

Viewing secondary data

You can display and view secondary data in the Staffing graph and grid, in any granularity (Day,15, 30, 60 minutes) and for any period (Week, Month, Year).

To display the data in the graph:

- Toggle on the secondary data check box below the graph.
  The secondary data appears in the graph as a broken dark blue line.

To display the data in a separate column in the grid:

- Select the **Secondary data** check box in the **Show columns** section of the **View options** drop-down menu.
  The column header will have the name of the secondary data type you choose from the Secondary data fly-out menu. This column is read-only (cannot be edited).

The list of statistics you see in the Secondary data fly-out menu depends on the object or activity type you select in the **Objects** pane. Fixed-staff activities/multi-site activities (MSA) do not have secondary data. If you select this activity type in the **Objects** pane, there is no **Secondary data** fly-out menu nor does the column in the grid.

You can display secondary data for an object by selecting one of the following types in the fly-out menu:

<table>
<tr><th>Secondary data type</th><th>Description</th><th>Displays in menu if selected object is:</th></tr>
<tr><td>Service Level Objective</td><td>The requirement for the service level, as defined when building the forecast.</td><td>• business unit
• site
• immediate activity or MSA
• deferred activity or MSA</td></tr>
<tr><td>Service Level</td><td>The forecast service level, which is calculated using Staffing Calculated values.</td><td rowspan="2">• business unit
• site
• immediate activity or MSA</td></tr>
<tr><td>Service Level Required</td><td>The forecast service level, which is calculated using Staffing Required values.</td></tr>
<tr><td>Deferred Service Level</td><td>The forecast deferred service level, which is calculated using Staffing Calculated values.</td><td rowspan="4">• business unit
• site
• deferred activity or MSA</td></tr>
<tr><td>Deferred Service Level Required</td><td>The forecast deferred service level, which is calculated using Staffing Required values.</td></tr>
<tr><td>Forecasted Calculated Queue</td><td>The forecast queue, which is calculated using Staffing Calculated values.</td></tr>
<tr><td>Forecasted Required Queue</td><td>The forecast queue, which is calculated using Staffing Required values.</td></tr>
<tr><td>Avg Speed of Answer Objective</td><td>The requirement for Average Speed of Answer (ASA), as defined when building the forecast.</td><td rowspan="3">Immediate activity or MSA</td></tr>
<tr><td>Avg Speed of Answer</td><td>The forecast Average Speed of Answer (ASA) , which is calculated using Staffing Calculated values.</td></tr>
<tr><td>Avg Speed of Answer Required</td><td>The forecast Average Speed of Answer (ASA), which is calculated using Staffing Required values.</td></tr>
</table>

Secondary data type	Description	Displays in menu if selected object is:
% of Abandons Objective	The requirement for the percentage of interactions abandoned, as defined when building the forecast.	
% of Abandons	The forecast percentage of interactions abandoned, which is calculated using Staffing Calculated values.	
% of Abandons Required	The forecast percentage of interactions abandoned, which is calculated using Staffing Required values.	
Maximum Occupancy Objective	The requirement for the maximum time that a logged-in agent should be handling interactions, as defined when building the forecast.	
Maximum Occupancy	The forecast maximum time that a logged-in agent will handle interactions, which is calculated using Staffing Calculated values.	
Maximum Occupancy Required	The forecast maximum time that a logged-in agent will handle interactions, which is calculated using Staffing Required values.	

Editing data in the grid

In the **Scenario** > **Staffing** grid, WFM enables you to edit forecast staffing data. You can edit time steps and daily totals when the selected period is **Week** and edit weekly and daily totals when the selected period is **Month** or **Year**.

When changing the period, granularity, and/or values in the grid, note that daily totals are aggregated values for a 24-hour period. This means the daily and weekly totals automatically adjust and are redistributed according to the original distribution of staffing for each day of the week or week of the month/year. This is useful if you have a week in which you believe the staffing will increase, but you expect the staffing to arrive at about the same rate as in your original forecast, day-over-day.

Editing modes

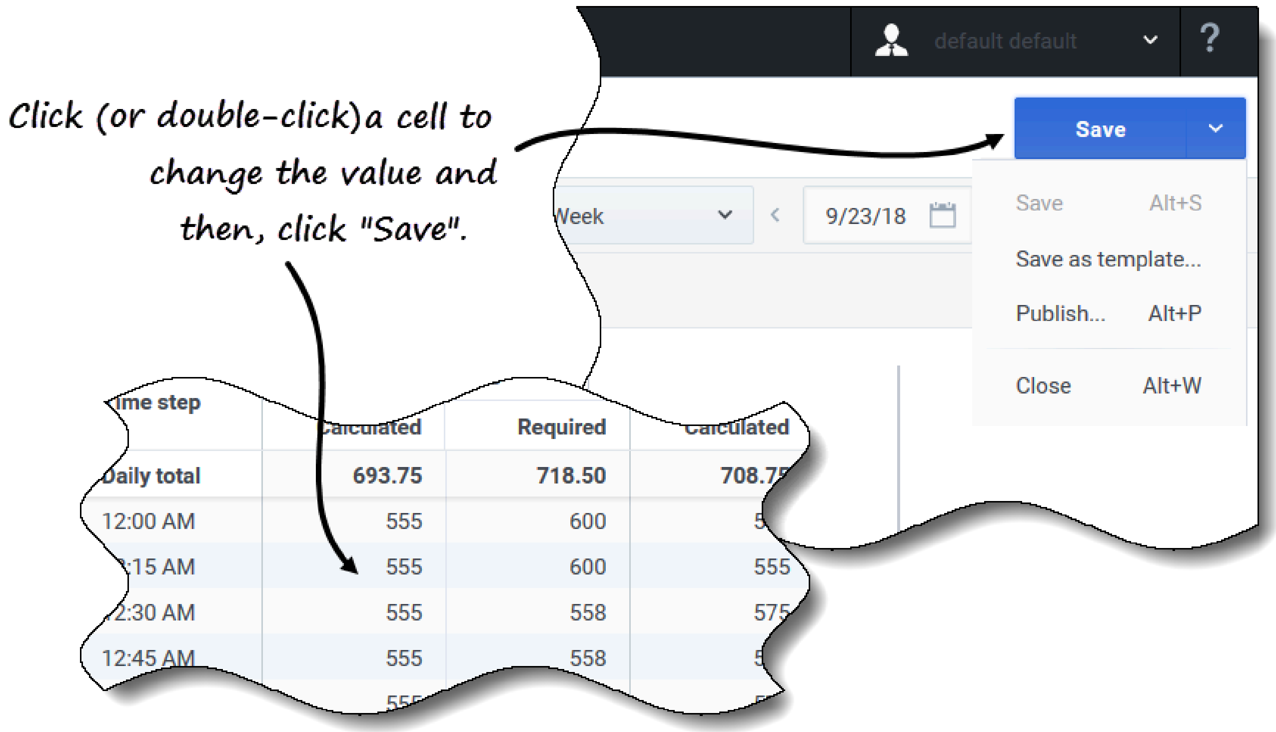
WFM provides two editing modes in the Staffing grid. Single-clicking a cell puts it into quick-editing mode and double-clicking a cell puts it into deep-editing mode. You can use either method for all editing functions.

Navigating the grid

In the grid, you can move from cell to cell by using the Enter or Shift+Enter keys on the keyboard. Click a cell and press:

- the Enter key to move the focus to the cell below the one selected.
- the Shift+Enter keys to move the focus to the cell above the one selected.

If you select a cell in the **Daily total** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.



Editing calculated or required data

1. Click (or double-click) the cell you want to change and enter a value.
2. When you have finished, in the upper-right corner of the view, click **Save** (or use the hotkey combo **Alt+S**).
   A message appears in the lower-right corner, indicating your changes were saved successfully.

If you switch to another view without saving the changes, a dialog opens with the message *Would you like to save changes to* . Click:

- **Save** to save the changes and switch to another view.
- **Discard** to discard the changes and switch to another view.
- **Cancel** to cancel the action, close the dialog and return to the Staffing view.

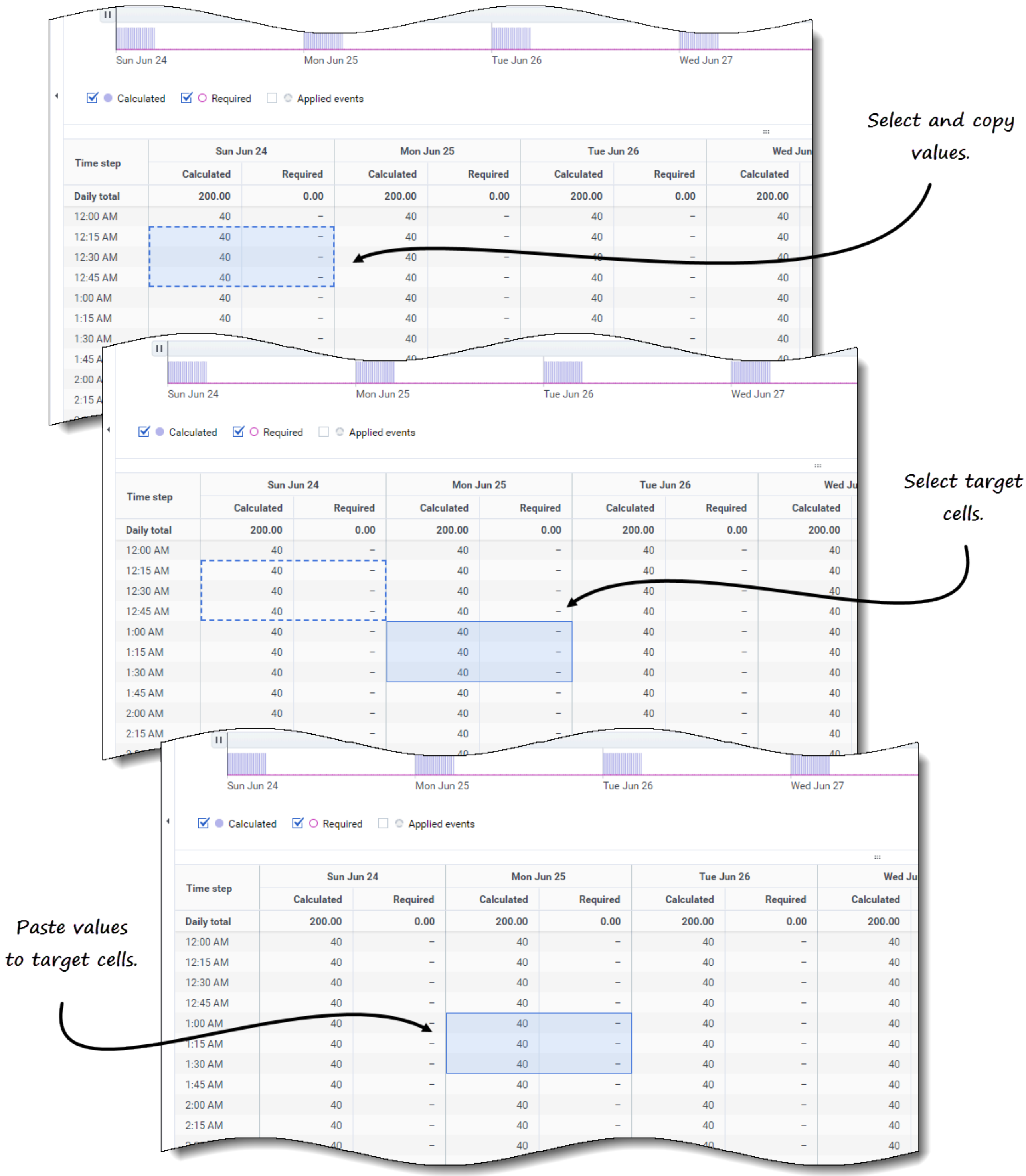
From the **Save** menu, you can also select:

- Publish (**Alt+P**) if you have modified the scenario data and want republish it.
- Save as template... to save this scenario as a template.
- **Close** (**Alt+W**) to close the scenario.

Selecting data to copy and paste

> **Tip**
> If you are unable to copy/paste, ask your administrator to confirm that your environment is using HTTPS secure connections to WFM.

Use **Copy** and **Paste** in the toolbar or use the Ctrl-C and Ctrl-V key combinations on your keyboard to select data in the **Staffing** view grid for copying and pasting. You can copy/paste within the grid and to/from documents, such as Excel or Notepad. You can also copy and paste data from Master Forecasts and other scenarios.



Copy and **Paste** are enabled in the toolbar when you select a single cell or a range of cells. When selected, cells are highlighted and bordered with a bold solid line. When copied to the clipboard, they are bordered with a dashed or broken line. Targeted or pasted cells are highlighted and bordered with a bold solid line.

When you copy empty cells together with cells that contain values, they are pasted as empty cells, overwriting any original values.

For some key combinations, you must select values in the Daily totals row, Time step column, and Date column (when the selected period is Month or Year) separately. They cannot be selected with other rows or columns in the grid. Also, time step values and dates can be pasted only to external sources (not into the grid). You cannot select, copy, or paste the Time step header row (Mon , Tue. etc.).

The grid scrolls automatically when you select a range of cells using the Arrow, Home, End, Page Up, or Page Down key, or the Shift+Arrow, Shift+Home, Shift+End, Shift+Page Up, or Shift+Page Down keys.

If you select more cells to copy than you select for paste, only a part of data is pasted. See more information about these functions in Managing templates.

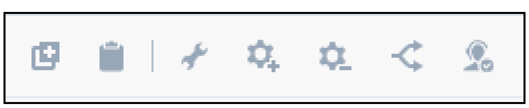
Pasting is disabled when:

- Nothing is selected in the grid
- A business unit or site is selected in the **Objects** pane. Select an activity or multi-site activity to enable it.
- Cells/values are selected for dates that are outside of the scenario date range.

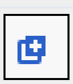
Attempts to paste any of the following invalid values into the grid or **Daily totals/Average** row results in the message: *Cannot paste invalid values.*

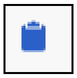
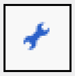
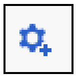
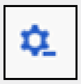
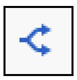
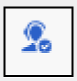
- Letters, special symbols, or negative values
- Decimal values that have more than 2 digits after the period. For example, 1525.423
- Non-integer values for time steps when Week and 15-minute granularity is selected
- Values that are out of range

Using the Scenario Staffing toolbar



Use the following buttons on the toolbar (above the graph) to modify and manage staffing data:

Icon	Name	Description
	**Copy**	Copies data selected in the grid to the clipboard.

Icon	Name	Description
	**Paste**	Pastes data from the clipboard to the selected area in the grid.
	**Build**	Opens the Build Staffing wizard, enabling you to build staffing data for the selected activity.
	**Add activities**	Opens the Add Activities dialog, enabling you to add activities to scenarios.
	**Remove activities**	Opens the Remove Activities dialog, enabling you to remove activities from scenarios.
	**Split**	Opens the Split Staffing wizard, enabling you to splits staffing data from a multi-site activity to site-specific activities.
	**Required**	Opens the Required Staffing wizard, enabling you to set the forecast's required number of agents.

Building staffing

Contents

Build staffing data, by defining the number of agents in forecast scenarios.

Related documentation:

-

In Workforce Management (WFM), you'll use the **Build Staffing** wizard in the **Scenarios Staffing** view to build staffing data in forecast scenarios for a selected single-site activity or multi-site activity, based on parameters that you provide.

To open this view, click **Forecast** > **Scenarios**. The **Scenarios** view opens, displaying a list of scenarios in a table. Open a scenario; You'll see the **Volumes** view by default. Switch to the **Staffing** view by clicking the drop-down menu beside the scenario's name.

Before you begin

Before using the **Build Staffing** wizard to build a staffing forecast, take these required actions:

- Use the Build Volumes wizard to build interaction volumes and AHT for activities and/or multi-site activities.
- If you plan to use templates, create them.

Be aware that even if there is IV and AHT data for child activities, this wizard does not build a staffing forecast for the parent multi-site activity.

For information about building staffing forecasts for multiple activities, see Building staffing for multiple activities.

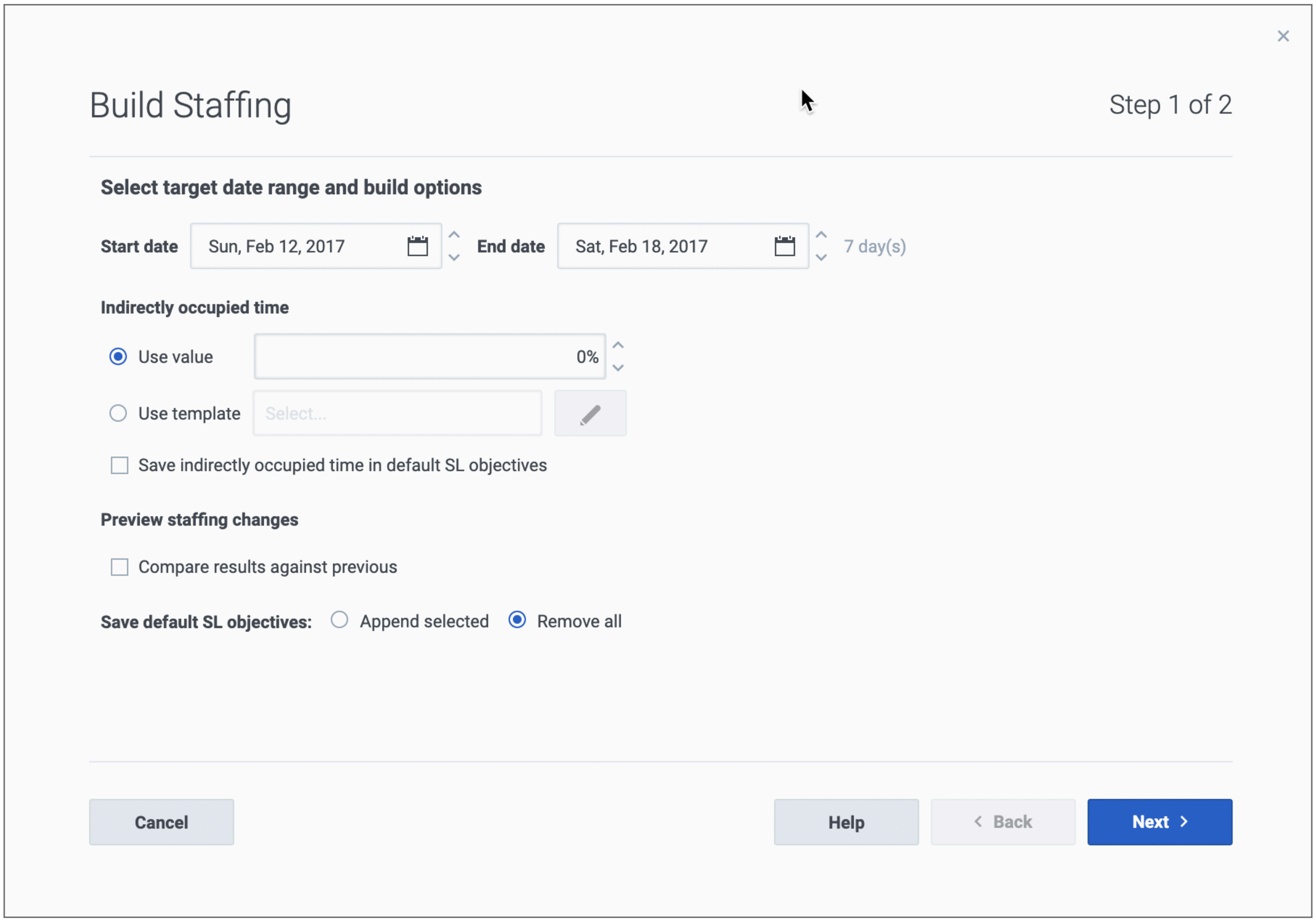
Building staffing data

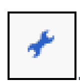
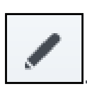
You must understand the difference between the following types of activities (mentioned in this procedure) so you can enter/choose optimal values for the activity you are staffing:

- **Immediate**—Work activities that are handled by agents immediately, such as voice calls.
- **Deferred**—Backlog activities, such as email, that use special forecasting calculations.
- **Fixed-staff**—Non-CTI activities that do not use Workforce Management service objectives.

In some cases, the **Build Staffing** dialog displays values that were used for the most recent staffing build or the default forecasting objectives values (if these have been specified and there were no previous builds). Otherwise, the parameter values are left blank. You can also save the values of certain parameters as the new default service level objectives (for more information, see Save default service level objectives).

Step 1: Build staffing data



1. In the scenario's **Staffing** view toolbar, click **Build** .
   The Build Staffing dialog opens.
2. Enter the target date range in the **Start date** and **End date** fields.
   The scenario's start and end date displays, by default.
3. In the Indirectly occupied time section, click one of two radio buttons:
   - **Use value**—Enter a value (for example, `0` to 99%).
   - **Use template**—Click **Edit** .

     Select **Save indirectly occupied time to default SL objectives** if you want to save the value you have specified as the default IOT value.
4. Enter a value in the **Initial queue** field. This option only displays if you are staffing a deferred or multi-site activity.
   Select the **Save initial queue time in default SL properties** if you want to save the value that you have specified as the new default service level value.

5. Select one of the save options for the **Save default SL objectives** setting. This setting only displays if you are staffing an immediate single or multi-site activity. For more information, see Save default service level objectives.
6. Select **Compare results against previous** if you want to compare this staffing build with an existing one. Otherwise, leave the check box as is.
7. Click **Next**.

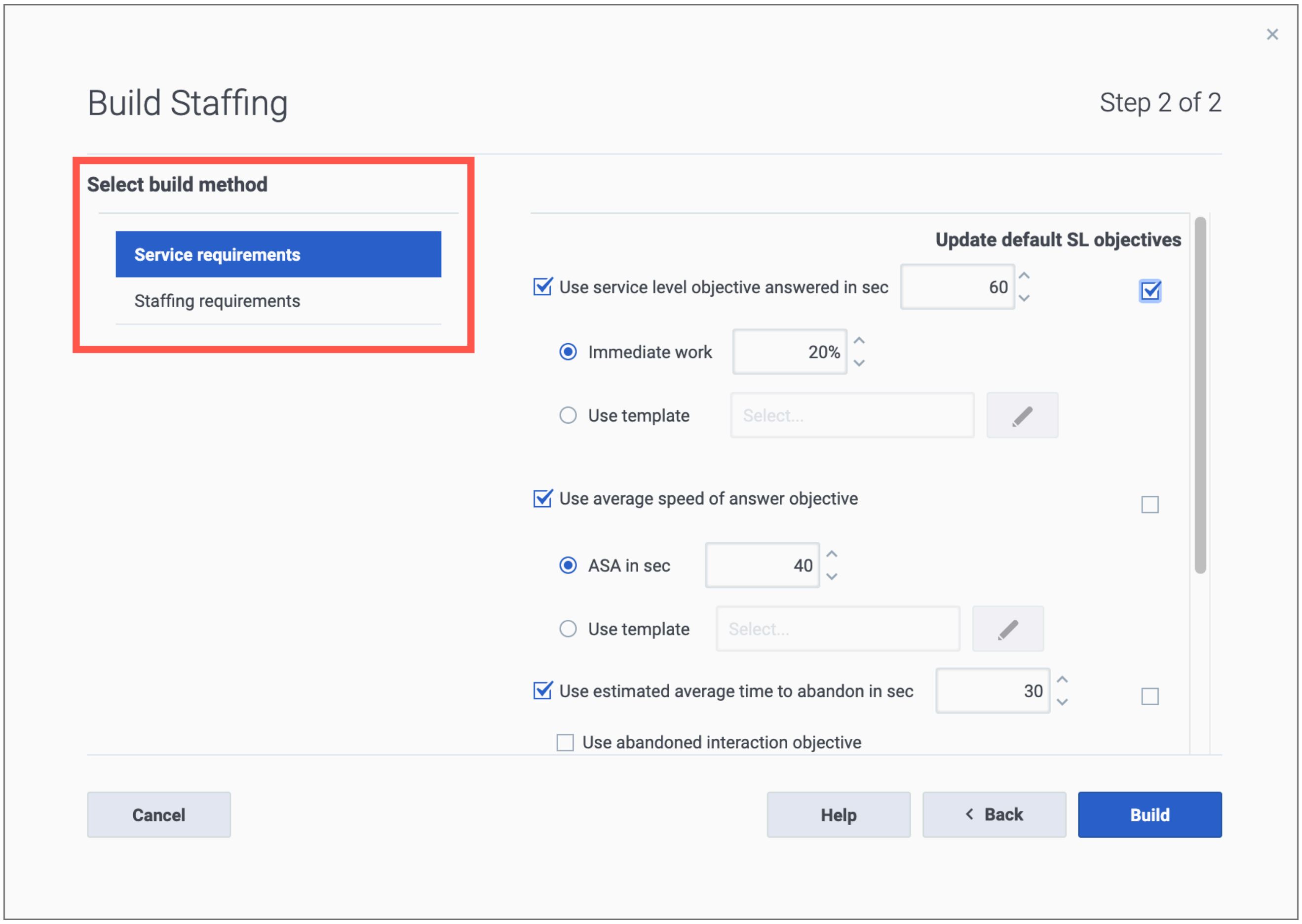
Step 2 of the dialog opens.

Selecting templates

When the **Select Templates** dialog opens:

- Select a template by clicking the down arrow in the name field.
- Enter the start and end dates or click the calendar icon to select them.
- Remove the check mark from the days of the week that are not applicable to this template.
- Click **Add template** to add more templates, if necessary.
    - If there are no templates available you must create them. See Before you begin.
- Click **OK**.

Step 2: Choose a method



The settings you see in the **Build Staffing** wizard Step 2 depend on the type of activity you are staffing.

1. If you are staffing:
   - An Immediate activity, select the build method. See either Defining service requirements or Defining staffing requirements.
   - A Deferred activity, see Defining multimedia service level objectives.
   - A Fixed-staff activity, see Defining staffing requirements.
2. Fill in each screen that opens, and then click **Finish**.
3. If you selected Compare results with previous in Step 1 of the **Build Staffing** dialog, the **Scenario Build Results** window opens.

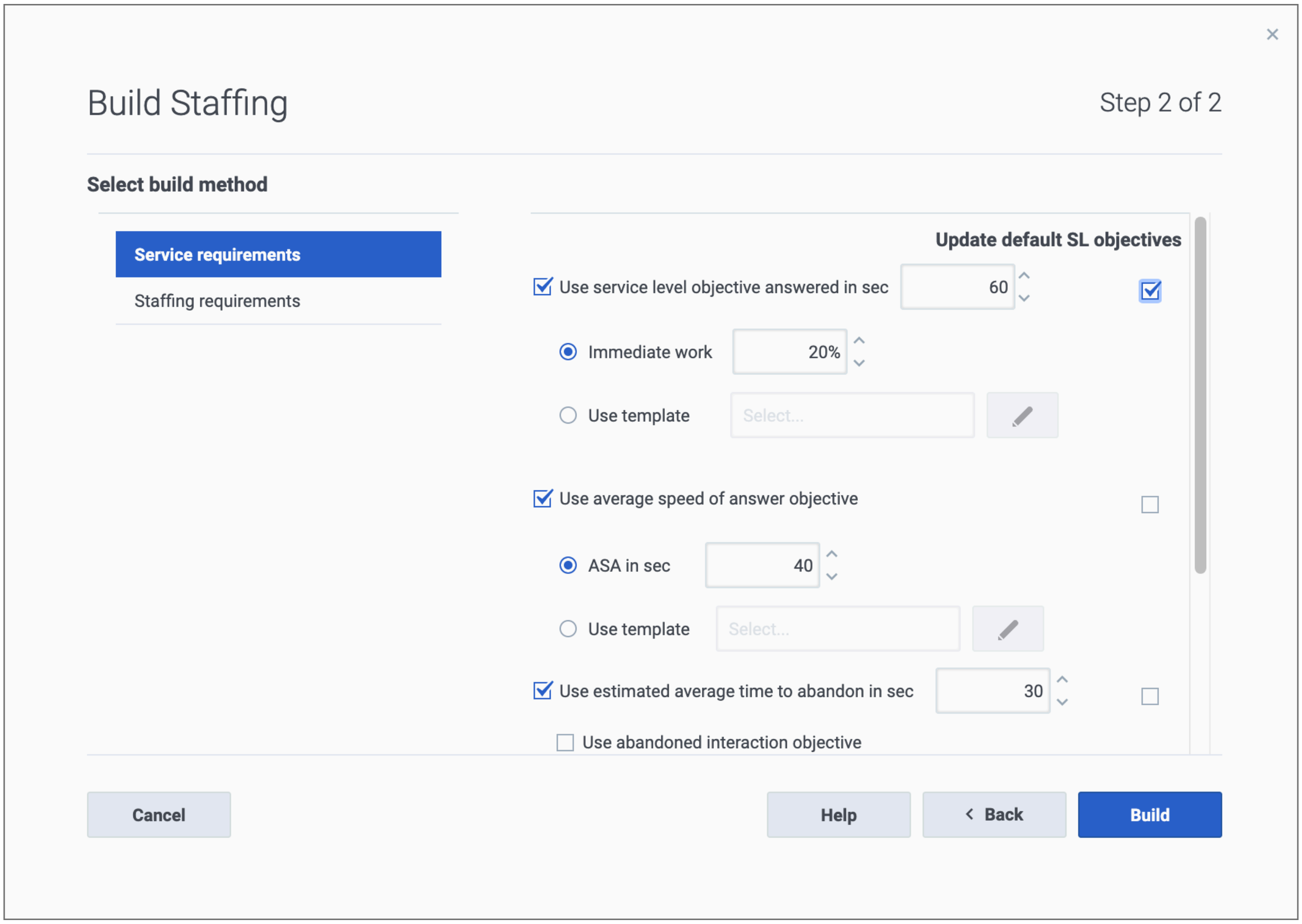
Next step:

- Publish the scenario to the Master Forecast. For details, see Publishing the forecast scenario.

Defining service requirements

If you select **Service requirements** for the build method in the **Build Staffing** wizard, use the following settings to define service level objectives when staffing Immediate activities. When you select an objective's check box, you enable the text boxes for these target levels.

In some cases, you might want to use a template if the values for the objective are different for certain time steps. Otherwise, WFM uses the single value that you configure and applies it across all open hours of the activity.



1. In Step 2 of the **Build Staffing** dialog, select the check box(es) for one or more of the following:
   - **Use service level objective answered in sec**—Specify the percentage of calls to be answered in a specific number of seconds. For example, 80% of calls must be answered in 20 seconds.
     - **Immediate work**—Enter a value (%) or
     - **Use template**—Click **Edit** to select a template from a list.
   - **Use average speed of answer objective**—Specify the average amount of time it takes for an agent to answer a call.
     - **ASA in "sec"**—Enter a value (seconds) or

- **Use template**—Click **Edit** to select a template from a list.

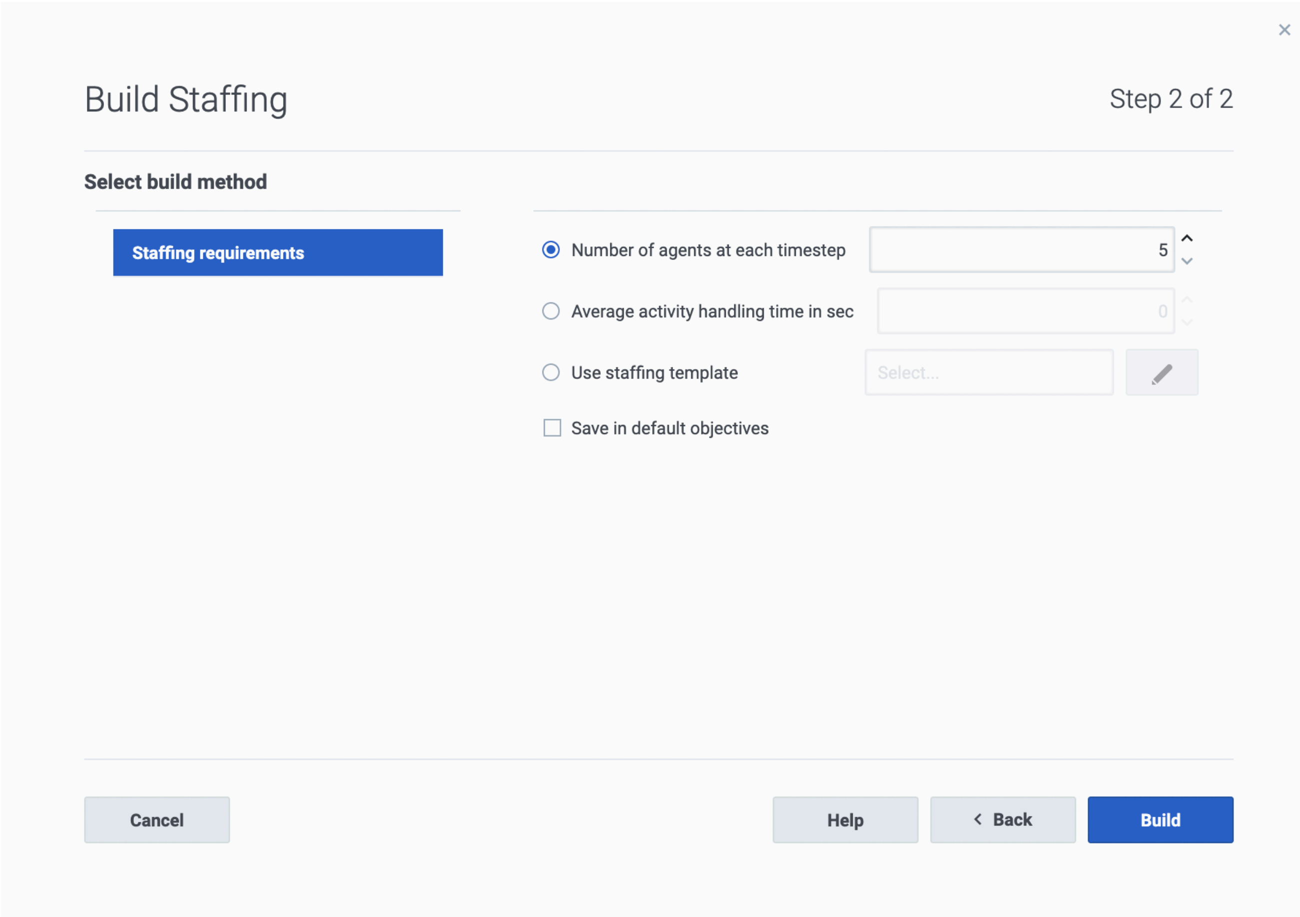
1. Continued...
    - **Use estimated average time to abandon in sec**—This is not a service objective. It's a parameter that helps define the queuing system used when WFM builds staffing requirements. This value represents the average time it takes for impatient callers to abandon the call.
        - **Use abandoned interaction objective**—Check this box to enable it and
        - **Maximum percent of interactions abandoned**—Enter a value (%).
    - **Use occupancy objectives**—The total amount of time the agent is actually working on an activity as a percentage of the total amount of time the agent is available to work on an activity. See the example.
        - **The maximum occupancy rate (%)**.—Enter a value (%) or
        - **Use template**—Click **Edit** to select a template from a list.
2. If you want to update the default service level objective values with the new values you have specified, select the **Update activity default SL objective** option for each parameter you want to update. For more information, see Save default service level objectives.
3. When all requirements are defined, click **Build**.
   WFM Web calculates staffing and displays the data in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Example—Occupancy objectives:

Assume an agent has a shift from 8am-5pm, with a 30-minute lunch and 2x15-min breaks. Although the agent's total shift duration is 9 hours, the total amount of time the agent is actually available for work is 8 hours, after subtracting the time for the lunch and breaks.

Defining staffing requirements

If you select **Staffing requirements** for the build method in the **Build Staffing** wizard, use the following settings to define how staffing requirements are built for Immediate activities, if you do not define any service objective, or for Fixed-staff activities.

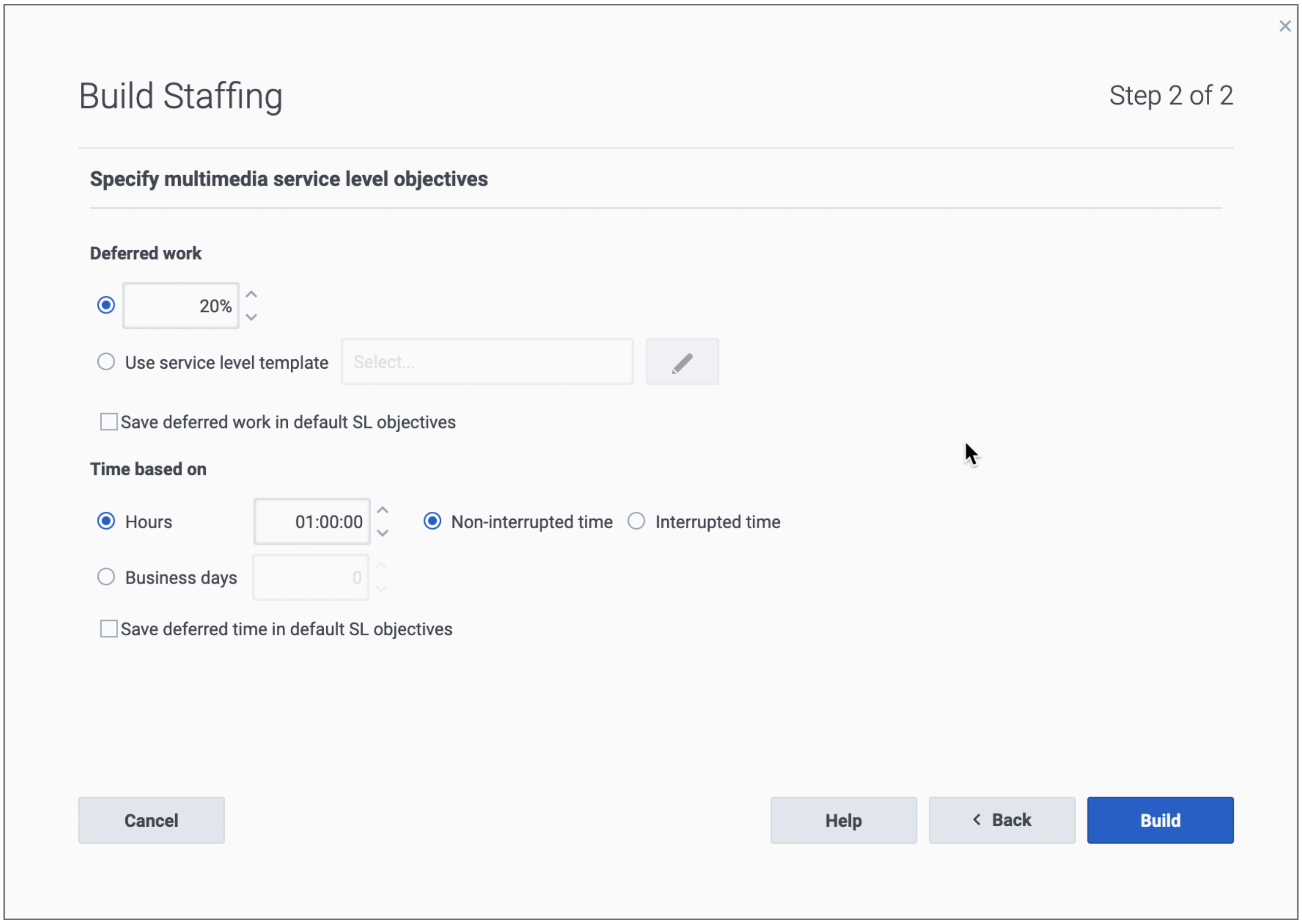


1. In Step 2 of the **Build Staffing** dialog, select one of the following options:
   - **Number of agents at each timestep**—Enter a value for the number of agents.
   - **Average activity handling time in "sec"**—Enter a value (seconds).
   - **Use staffing template**—Click **Edit** to select a template from a list.

   Select the **Save in default objectives** check box if you want to update the default staffing requirement values with the new values you have specified.
2. When all requirements are defined, click **Build**.
   WFM Web calculates staffing and displays the data in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Defining multimedia service level objectives

If you select **Multimedia service level objectives** for the build method in the **Build Staffing** wizard, use the following settings to define service level objectives when staffing Deferred activities, such as responding to emails. Use either one of the following procedures:



1. In Step 2 of the **Build Staffing** wizard:
   - Enter a value (%) for **Deferred work** or
   - Select **Use service level template** and click **Edit** to select a template from a list.

     Select the **Save deferred work in default SL properties** check box if you want to save the values you have specified as the default service level objective values for this setting.
2. Enter **Time based on**:
   - **Hours** and select either **Non-interrupted time** or **Interrupted time** or
   - **Business days** and enter an integer greater than `0`.

     Select the **Save deferred time in default SL properties** check box if you want to save the values you have specified as the default service level objective values for this setting.
3. When all objectives are defined, click **Build**.

Understanding the build staffing settings

Use **Build Staffing** dialog to specify the settings described below.

Indirectly occupied time

Indirectly occupied time (IOT) is a parameter that helps to define the queuing model that WFM uses when building a staffing forecast. WFM considers a certain pool of agents in its queuing model when determining how calls will be distributed from the queue to agents. IOT affects the availability of agents to handle calls. For example, if you enter a value for IOT, such as `10%`, an agent will not be in the agent pool `10%` of the time (because the agent is off the phone).

Alternatively, you can define IOT by using a template.

Compare results against previous

If you selected the **Compare results against previous** check box in the Build Staffing wizard Step 1, WFM compares the results obtained from the wizard with the previous staffing scenario results.

If you selected a Deferred activity, the **Initial queue** field displays. Enter an integer value that is `0` or greater, or leave this value empty and the build process will assume that the value is `0`.

After you have completed the steps in the wizard, the Staffing Build Results window opens, showing a comparison of the new and previous calculated staffing in a graph.

Where the new calculated staffing results in:

- An increased number of agents, the graph shows the area in dark blue.
- A decreased number of agents, the graph shows the area in rose.

Click **Save** to keep the new calculated staffing in your scenario or **Discard** to return to the original calculated staffing values.

What is the initial queue value?

The initial queue value is used in the Contact Center Performance Report > **Queue** > **Forecasted** column for the first day of the new forecasting period after you publish the Master Forecast. For example, if you have published the Master Forecast for 02/02 - 08/02, the Forecasted column for 09/02 displays the backlog value that is proposed in the Staffing Forecast Build wizard for 09/02 in the **Initial queue** field.

The **Initial queue** field is visible only for Deferred activity types.

Save default service level objectives

If you are building staffing for a single (or multi-site) **Immediate** activity type, you can choose to update some or all of the default service level objectives with the new values you have specified. You can choose which parameter values to save as the new defaults by selecting the **Update activity default SL objective** option in the **Build Staffing** dialog for each parameter you want to update. You can then apply the updates in one of two ways:

- **Remove all** is the default setting. For each parameter where the **Update activity default SL objective** option is selected, the default service level objective value for that parameter is updated to the new specified value while the default values (or templates) for all other parameters are cleared.

- When **Append selected** is selected, the default service level objective value for each parameter where the **Update activity default SL objective** option is selected is updated to the new specified value. The default values for all other parameters remain unchanged.

If you do not select the **Update activity default SL objective** check box for any parameters, the default values remain unchanged.

Important

If you are using templates to specify the parameter values, you can select only one template to save when choosing to update the default service level objectives for the activity. WFM Web will prompt you to choose the template you want to save. The staffing will be built according to the values of all selected templates, but only the template selected to be saved will update the default service level objective value.

Building staffing for multiple activities

Contents

- 

- Supervisor

Build staffing data for multiple activities based on default forecasting objectives.

Related documentation:

-

In Workforce Management (WFM), you'll use the **Build Staffing** in the **Scenarios Staffing** view to build staffing data for multiple activities.

To open this view, click **Forecast** > **Scenarios**. The **Scenarios** view opens, displaying a list of scenarios in a table. Open a scenario; You'll see the **Volumes** view by default. Switch to the **Staffing** view by clicking the drop-down menu beside the scenario's name.

When you select a Site or Business Unit (BU), you are able to build staffing for multiple activities based on the Default forecasting objectives that were defined for each activity type (Immediate, Deferred, Fixed-Staff).

Before you begin

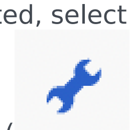
Before using the **Build Staffing** wizard to build a staffing forecast for multiple activities, use the Default forecasting objectives to set the default forecasting objectives for each activity type (Immediate, Deferred, Fixed-Staff).

Building staffing data for multiple activities

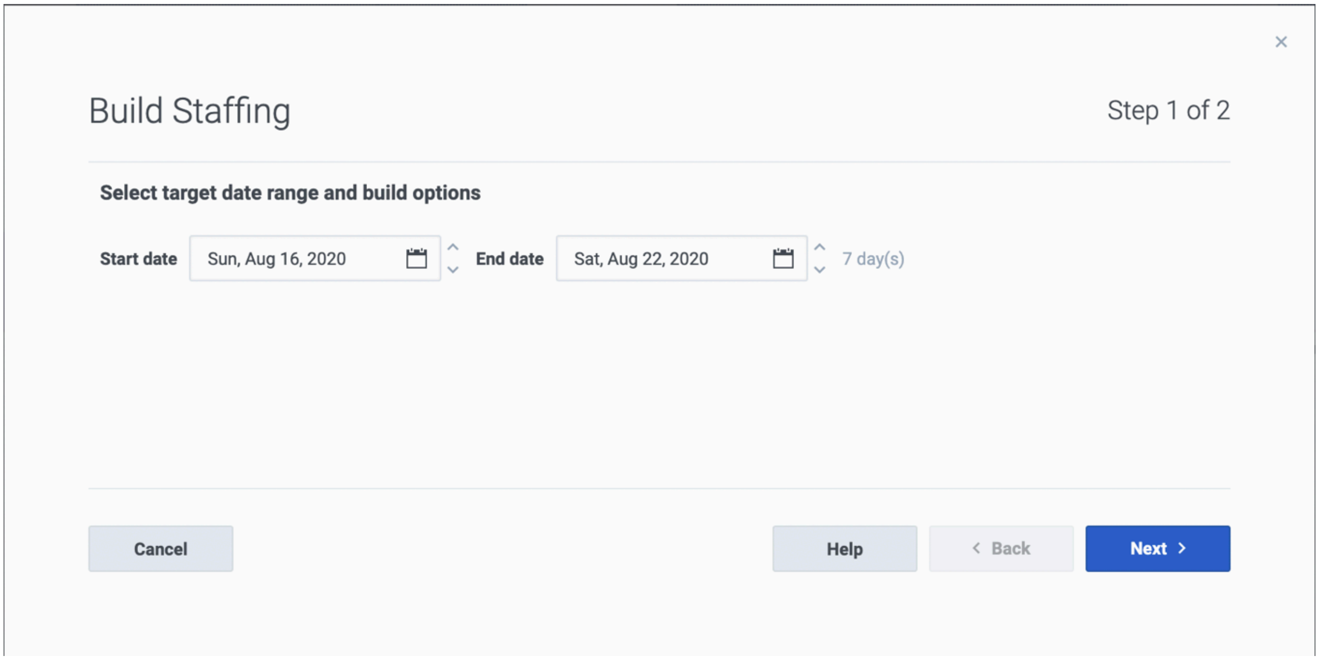
The **Build Staffing** wizard uses the default forecasting objectives that were defined for each of the following activity types (for activities under sites and multi-site activities):

- **Immediate**—Work activities that are handled by agents immediately, such as voice calls.
- **Deferred**—Backlog activities, such as email, that use special forecasting calculations.
- **Fixed-staff**—Non-CTI activities that do not use Workforce Management service objectives.

You won't be able to make changes to these values when using the wizard to build staffing for multiple activities.

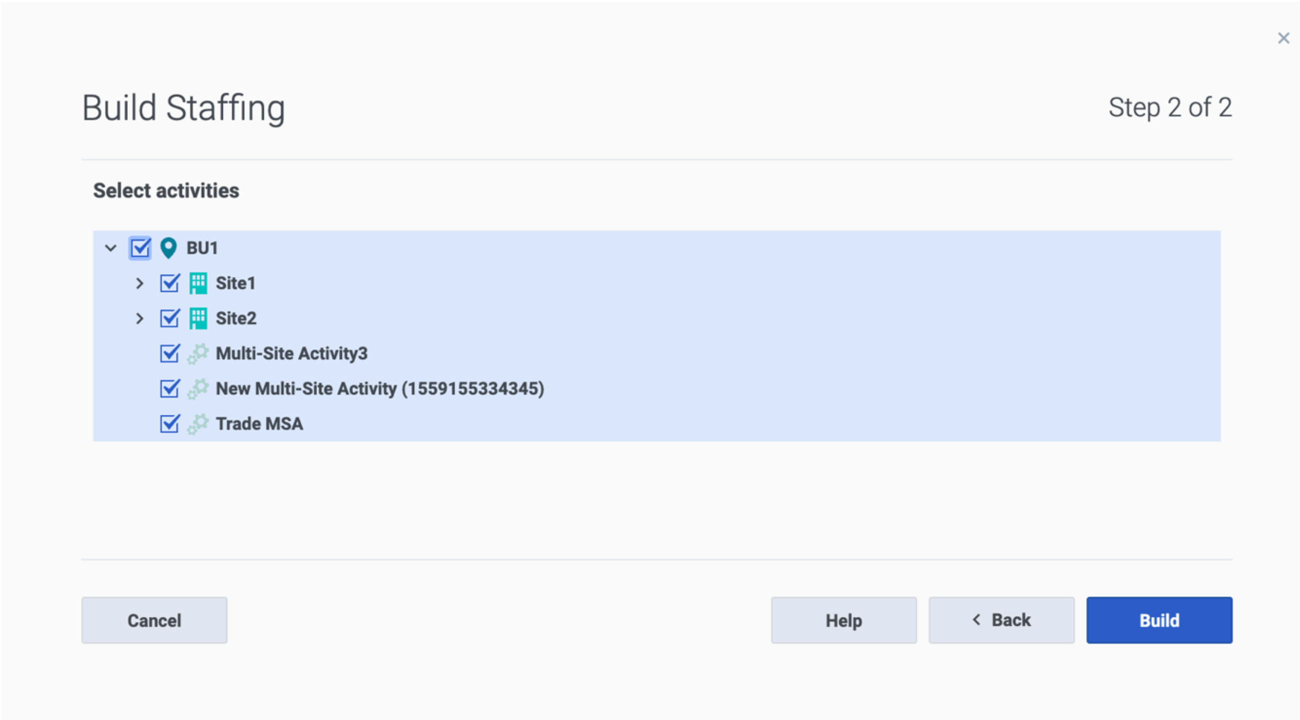
To get started, select a Site or BU from the **Activities** list. In the scenario's **Staffing** view toolbar, click **Build** () to launch the **Build Staffing** wizard.

Step 1: Select target dates



- Select the **Start date** and **End date** for the target date range. By default, the scenario's start and end date displays.
- Click **Next**.

Step 2: Choose activities



- Expand business units to display their sites and activities.
- From the list of activities, select the activities you want to build staffing data for.
- Click **Build**.

Required and split staffing methods

Contents

Set the required staffing values and learn how to split multi-site activities staffing data between its associated activities.

Related documentation:

-

Workforce Management (WFM) provides different methods to staff (define the number of agents required for) forecast scenarios, such as Required and Split Staffing.

Required staffing is a user-defined data series that you build, by using the Required Staffing wizard. The Split Staffing wizard enables you to split the number of agents required for a multi-site activities (MSA) into specific amounts for each activity within the MSA.

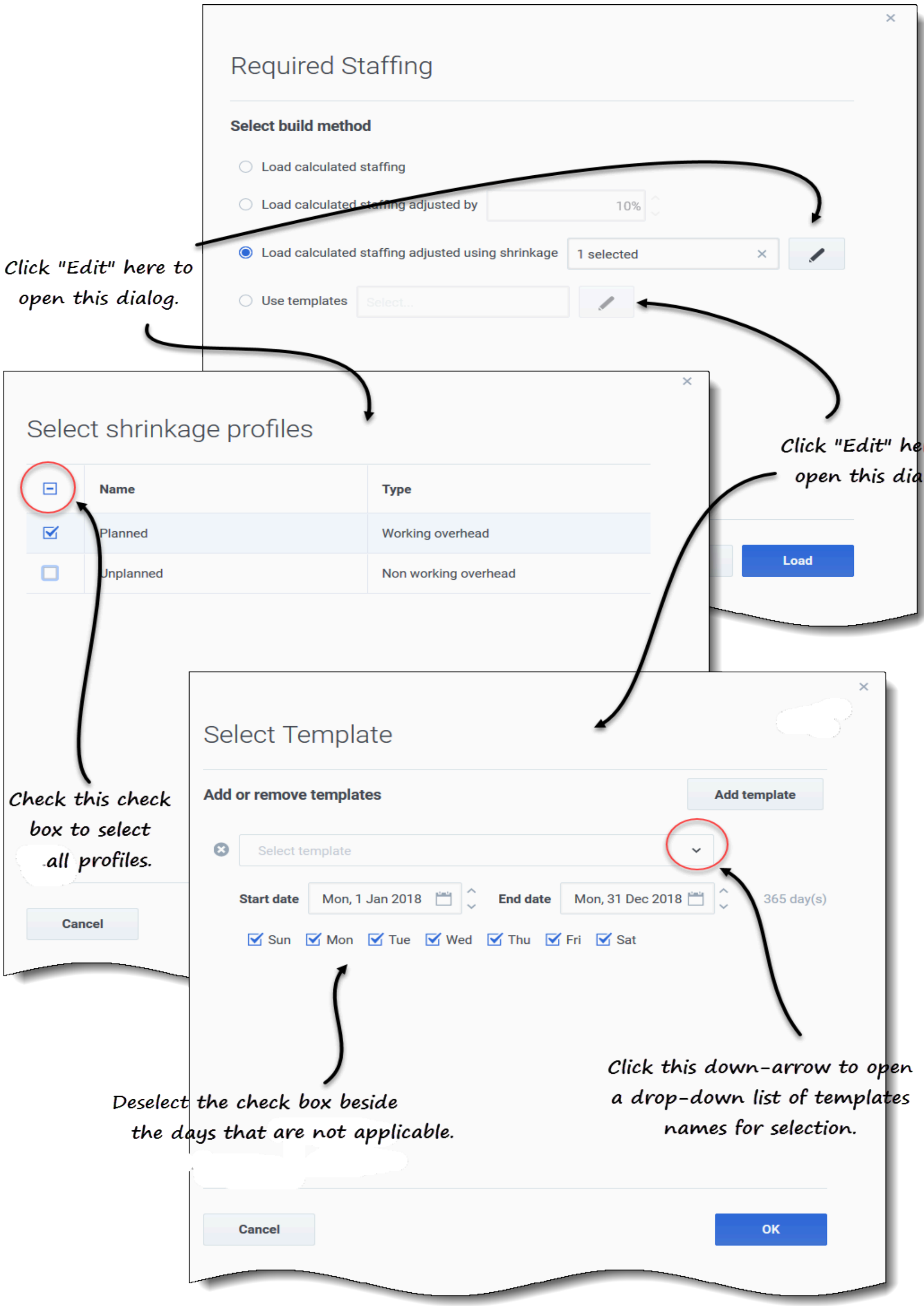
Using required staffing values

Use the **Required Staffing** wizard to define required staffing values in a forecast scenario's Staffing view.

Here's what you should know about required staffing and how you can use it:

- Required staffing data is user-defined staffing requirements for a forecast scenario.
- If you have compiled calculated-staffing values, you can set required staffing to the same values as calculated staffing.
- Forecasts can contain both calculated and required data. You can build schedules by using either set of data.
- Required staffing can be composed of a combination of template values, manually entered amounts, and calculated staffing values.

> **Tip**
> Before selecting the template in this wizard, create templates as needed.


Required Staffing
Select build method
Load calculated staffing
Load calculated staffing adjusted by
10%
Load calculated staffing adjusted using shrinkage
1 selected
Use templates
Select...
Load
Click "Edit" here to open this dialog.
Select shrinkage profiles
Name
Type
Planned
Working overhead
Unplanned
Non working overhead
Cancel
Click "Edit" here to open this dialog.
Check this check box to select all profiles.
Select Template
Add or remove templates
Add template
Select template
Start date
Mon, 1 Jan 2018
End date
Mon, 31 Dec 2018
365 day(s)
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Deselect the check box beside the days that are not applicable.
Click this down-arrow to open a drop-down list of templates names for selection.
Cancel
OK

Setting the required staffing

1. In the navigation bar, click **Forecast** > **Scenarios**.
   The Scenarios view opens.
2. Beside the scenario you want to staff, click **Actions** and then, select **Open**.
3. At the top, near the scenario name, click the **Volumes** drop-down menu and select **Staffing**.
4. In the **Activities** pane, select an activity or multi-site activity and click **Required**.
   The Required Staffing wizard opens.
5. Choose one of four build methods:
   - **Load calculated staffing**
   - **Load calculated staffing, adjusted by**
   - **Load calculated staffing adjusted using shrinkage**
   - **Use templates**

- Select **Load calculated staffing** to apply calculated staffing to required staffing with no changes.
- Select **Load calculated staffing, adjusted by** and enter a percentage to adjust calculated staffing before applying it to required staffing. Valid values are from -99 to 999.
- Select **Load calculated staffing adjusted using shrinkage** and click **Edit** to adjust calculated staffing, before applying it to required staffing.
  1. When the **Select shrinkage profile** dialog opens, select the check box beside the profiles you want to use, or select the top-most check box to select all profiles.
  2. Click **OK** to return to the **Required Staffing** dialog.
     The Load calculated staffing adjusted using shrinkage field is updated with the number of profiles you selected.
- Select **Use templates** and click **Edit** to apply one or more staffing templates
  1. When the **Select Template** dialog opens, click the down arrow in the empty field to select a template.
  2. To add another template, click **Add template**.
  3. For each template, enter a start and end date, or use the date selectors to set these fields.
  4. Deselect the check boxes for the week days that are not applicable.
  5. Click **OK** to return to
     The Use templates field is updated with the number of templates you selected.

In the **Required Staffing** dialog, click **Load** and when the loading process is complete, click **OK**.

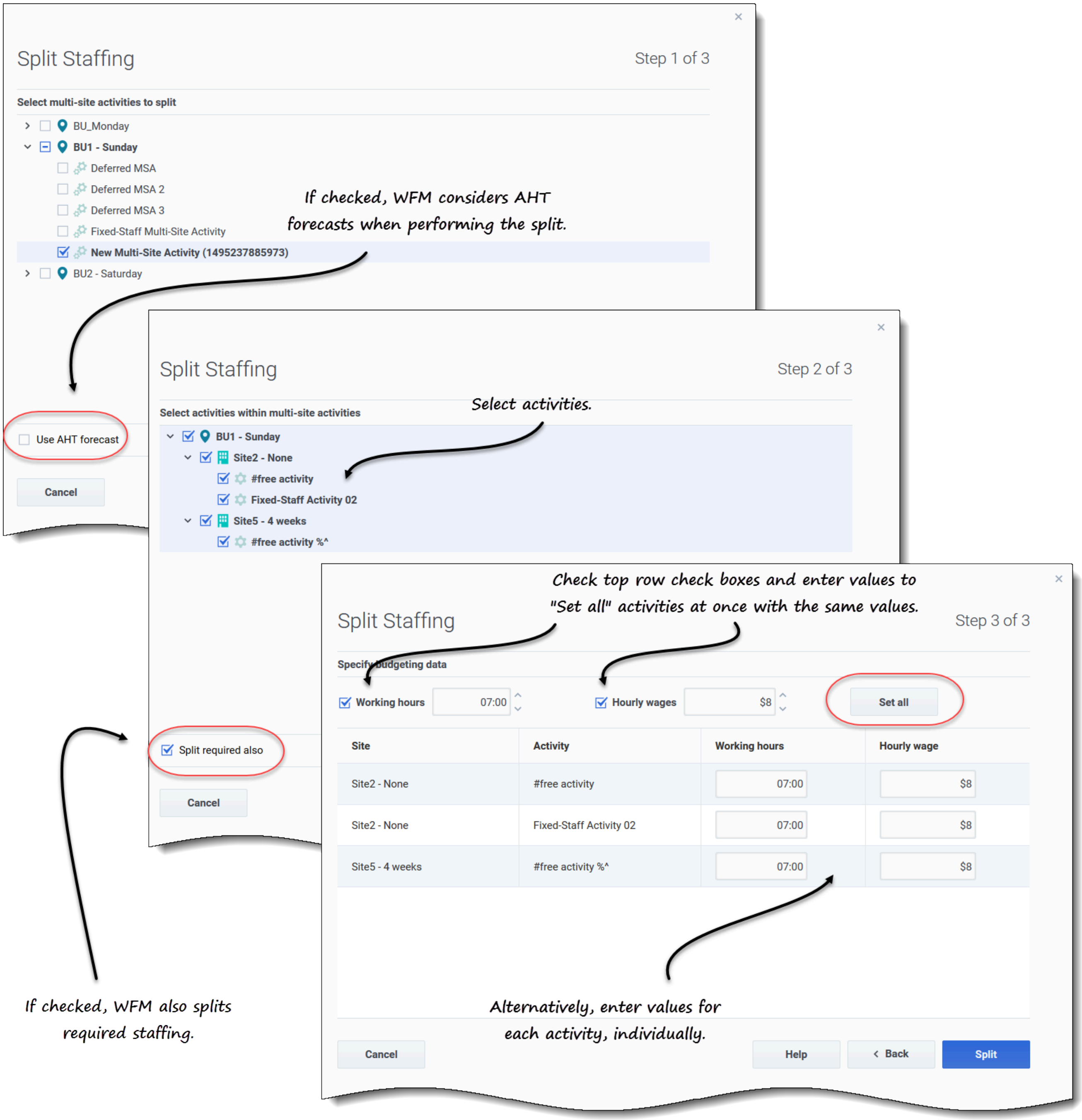
Splitting the staffing data

Use the **Staffing Split Wizard** to split staffing from a multi-site activity (MSA) **Staffing forecast** scenario.

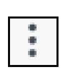
A multi-site activity (virtual activity set) has one or more associated activities (existing activities). After building calculated and required staffing for a multi-site activity, you can then use this wizard to split the result between associated activities.

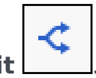
Tip

The **Staffing Split Wizard** is available only within a **Forecast Scenario**. You must add a multi-site activity to the forecast scenario for them to be available for splitting in **Staffing Split Wizard**.



Splitting staffing for a multi-site activity

1. In the navigation bar, click **Forecast** > **Scenarios**.
   The Scenarios view opens.
2. Beside the scenario you want to staff, click **Actions**  and then, select **Open**.

3. At the top, near the scenario name, click the **Volumes** drop-down menu and select **Staffing**.
4. In the **Activities** pane, select multi-site activity and click **Split** .
   The Split Staffing wizard opens.
5. Using the check box, select the multi-site activity that you want to be split between associated activities.
   You can select several multi-site activities within the same business unit.
6. Select **Use AHT forecast** if you want WFM Web to consider average handling time forecasts when performing the split and then, click **Next**.
   Step 2 of the wizard opens.

Step 2: Selecting activities within MSA

1. At the bottom of the pane, select **Split required also**, if you also want to split required staffing.
2. Select the local (target) activities into which you want to split the multi-site activities.
3. Click **Next**.
   Step 3 of the wizard opens.

Step3: Specify budgeting data

1. If you want each activity to have the same values, in the top row:
   1. Select and enter the **Working hours** (paid hours per day).
   2. Select and enter the **Hourly wages**.
   3. Click **Set all**.
2. If you want activities to have different values, enter **Working hours** and **Hourly wages** for each activity, individually.
3. Click **Split**.
   WFM Web displays a progress dialog while it splits the activities.
4. When the split process is complete, click **OK**.

You can click **Cancel** in this dialog at any time if you want to cancel the split.

Shrinkage in scenarios

Contents

Learn about the types of data you'll find in the Shrinkage grid, how to navigate it, and customize it.

Related documentation:

-

In Workforce Management (WFM) you'll use the **Shrinkage** view (formerly named *Overheads*) to view overhead data, which WFM uses to forecast shrinkage while scheduling.

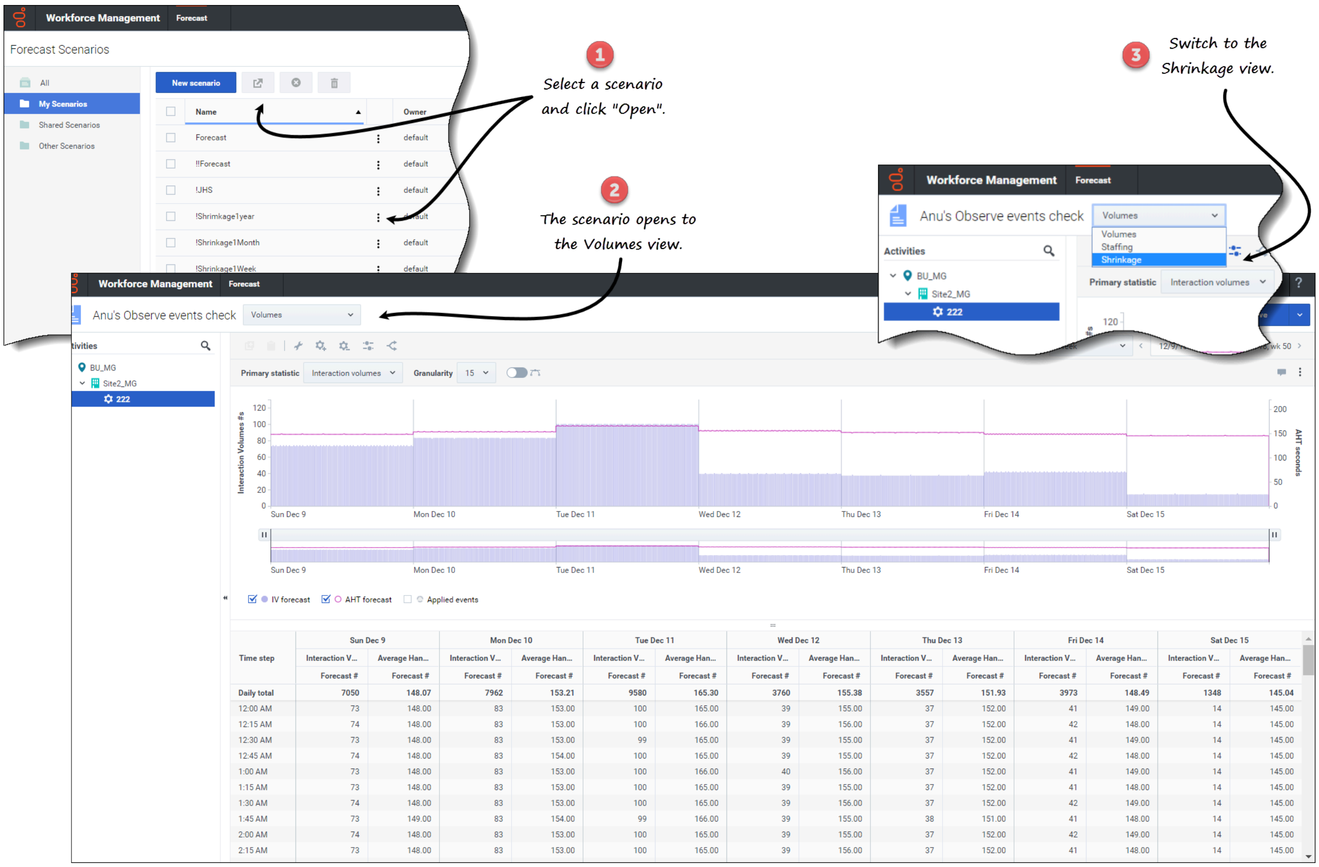
This view provides standard date-selectors and a grid that shows shrinkage percentages for days and timesteps.

You can perform the following functions in this view:

- View shrinkage totals.
- Add and delete shrinkage associated with the current Schedule State Group for a specific activity.
- Edit shrinkage associated with the current Schedule State Group for a specific activity.

Viewing the shrinkage data

Open the **Shrinkage** view by using the scenario's drop-down menu (see below). Scenarios open in the **Volumes** view by default.



Opening the Shrinkage view

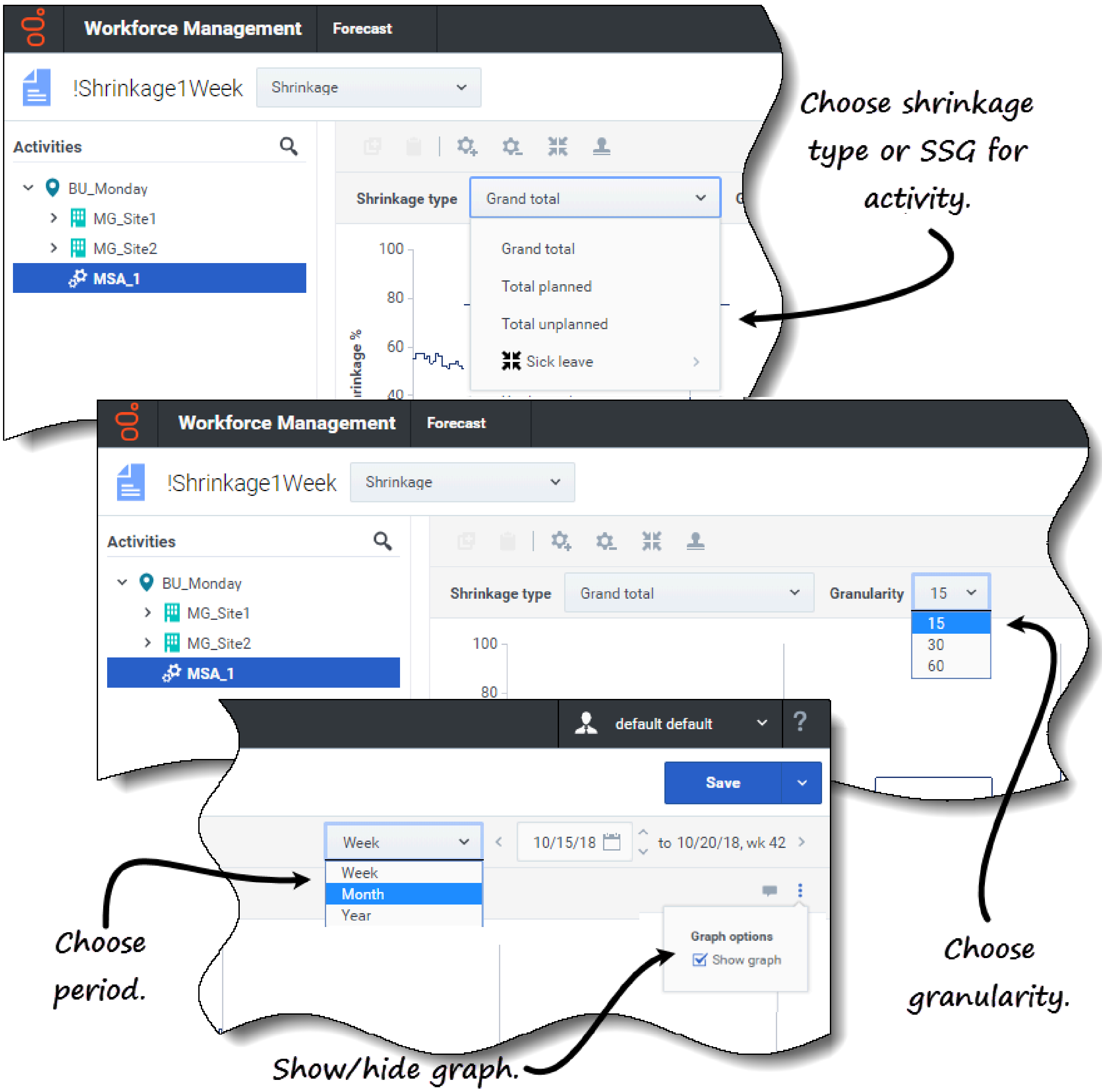
1. In the **Forecast** module, select **Scenarios**.
2. Select a scenario from the list in the data pane, and click **Open** in the toolbar or in the **Actions** drop-down menu.
   The Volumes view opens by default with the scenario name in the top-left corner of the window.
3. Click the scenario's drop-down menu and select **Shrinkage**.
4. In the **Objects** tree, expand a business unit, then a site to select an activity, or multi-site activity.
   The view displays a graph above a table or grid, each containing the same shrinkage values, and controls that set the data display properties for the graph and table.

If you have not selected an activity, you'll see the message *Select an activity within the nested tree to load shrinkage*. If you still do not see any data, you might need to adjust the Period, Granularity, or date-selectors at the top of the window to reflect those used for the forecast.

You can also view, add, and edit the volumes or staffing data in opened scenarios, by selecting Volumes or Staffing from the drop-down menu near the scenario name.

Setting the data display properties

In this view, the graph's y-axis represents the shrinkage percentage; the x-axis represents the selected period (week, month, year).



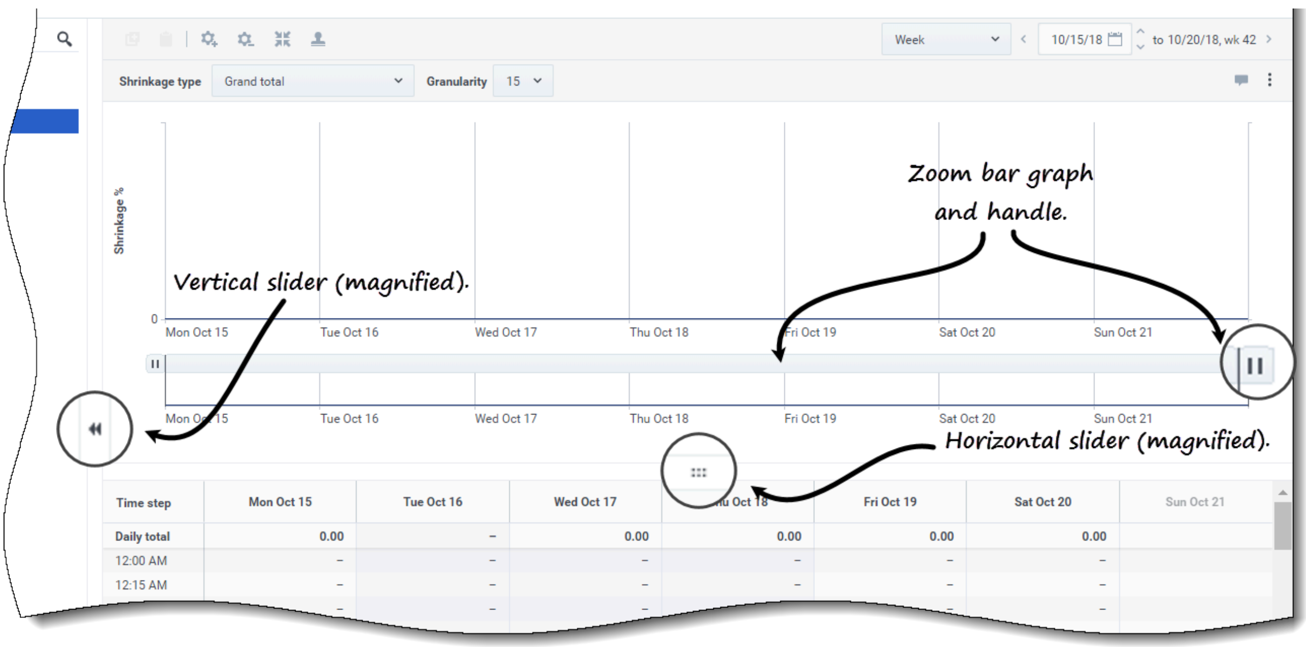
Use the following controls to customize the data display in the graph and table:

- **Shrinkage type** *drop-down list*—Select the shrinkage type that will be displayed as primary, by

selecting **Grand total**, **Total planned**, or **Total unplanned**.
If you select a business unit or site, you see only the first three shrinkage types. If you select an activity that is associated with a Schedule State Group (SSG), the SSG appears on the list. If you select a multi-site activity that has a child activity that is associated with an SSG, Schedule State Group appears in the list.

- **Period** *drop-down list*—Change the period or time range for the graph and grid by selecting **Year**, **Month**, or **Week**.

- **Granularity** *drop-down list*—Adjust the granularity to **Day** if you selected **Month** or **Year** in the **Period** drop-down list. Adjust the granularity to **15**, **30**, or **60** (minutes) if you selected Select **Week** in the **Period** drop-down list.
- **Date range**—Use the date-selectors (top-right portion of the view) to switch to a different period within the scenario forecast's date range.
-  **Actions** *drop-down menu*—Click this icon to change the graph:
    - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also Sliders.



Watch the video demonstrating how the following features work. (The smooth graph feature described in the first half of the video is not available this view.)

- **Sliders**—Drag the vertical slider left/right to show/hide the graph, zoom bar, grid and/or **Objects** pane. Click the arrows in the vertical slider to resize the **Objects** pane. Drag the horizontal slider up/down to show/hide the graph and/or grid.

- **Zoom bar**—Use the zoom bar handles to narrow or widen the focus in the graph, by sliding the handle left or right. You can zoom to a minimum of one day. After narrowing the focus, place your cursor over the graph and change the range of the zoom by dragging and dropping it to the left or right. For example, if you narrow the focus to Sunday, Monday, and Tuesday, but want to change it, drag and drop the zoom to the right to Tuesday, Wednesday, Thursday.

Reading the data

The table provides columns that display the following statistics:

- **Daily total**—If you select the period **Week**, this row shows daily totals for shrinkage.
- **Weekly total**—If you select the period **Month** or **Year**, these columns show the weekly totals for shrinkage.
- **Date/Time step**—Identifies the range of dates or timesteps in this row. The column name and contents will differ, depending on the period and granularity you selected above.
- **[Days or Dates]**—If you select the:
    - **Week** date range—Each group of columns indicates one day. The top row shows daily totals and each lower row shows statistics for one timestep on that date.
    - **Month** date range—Each group of columns shows shrinkage for one full day.
    - **Year** date range—Each group of columns shows shrinkage for one full day.

  Timestep durations depend on the granularity that you selected above.
- **Shrinkage type**—If you select:
    - **Grand Total**—A read-only statistic; the aggregate shrinkage for the selected target.
    - **Total Planned**—A read-only statistic; the aggregate planned shrinkage for the selected target.
    - **Total Unplanned**—A read-only statistic; the aggregate unplanned shrinkage for the selected target.
    - **name>**—The name of the Schedule State Group (SSG) when an activity is selected (for example **My Meeting**). Indicates shrinkage values that are associated with this SSG and the target. If the target is a multi-site activity, the activity name is prefixed with the SSG name (for example **Schedule State Group**).

WFM displays shrinkage for the item that is selected in the **Object** pane. If the item is an activity, then the **Shrinkage type** list shows the Schedule State Groups that are associated with the activity. If the item is a multi-site activity, the menu lists all Schedule State Groups that are associated with its child activities.

You can edit shrinkage values for activities or multi-site activities. See Editing data in the grid.

Editing data in the grid

In the **Scenario** > **Shrinkage** grid, WFM enables you to edit forecast shrinkage data. You can edit time steps and daily totals when the selected period is **Week** and edit weekly and daily totals when the selected period is **Month** or **Year**.

To enable editing in the grid, you must select an activity. To edit a multi-site activity, you must select and edit one of its child activities. You cannot edit a multi-site activity directly. If you select **Grand total**, **Total planned**, or **Total unplanned**, you cannot edit values in the grid.

When changing the period, granularity, and/or values in the grid, note that daily totals are aggregated values for a 24-hour period. This means the daily and weekly totals automatically adjust and are redistributed according to the original distribution of shrinkage for each day of the week or week of the month/year. This is useful if you have a week in which you believe the shrinkage will increase, but you expect the shrinkage to arrive at about the same rate as in your original forecast, day-over-day.

Editing modes

WFM provides two editing modes in the Shrinkage grid. Single-clicking a cell puts it into quick-editing mode and double-clicking a cell puts it into deep-editing mode. You can use either method for all editing functions.

Entering invalid values

The Shrinkage grid does not accept invalid values. In most cases, WFM attempts to convert certain characters or symbols into a valid value. Here are some examples:

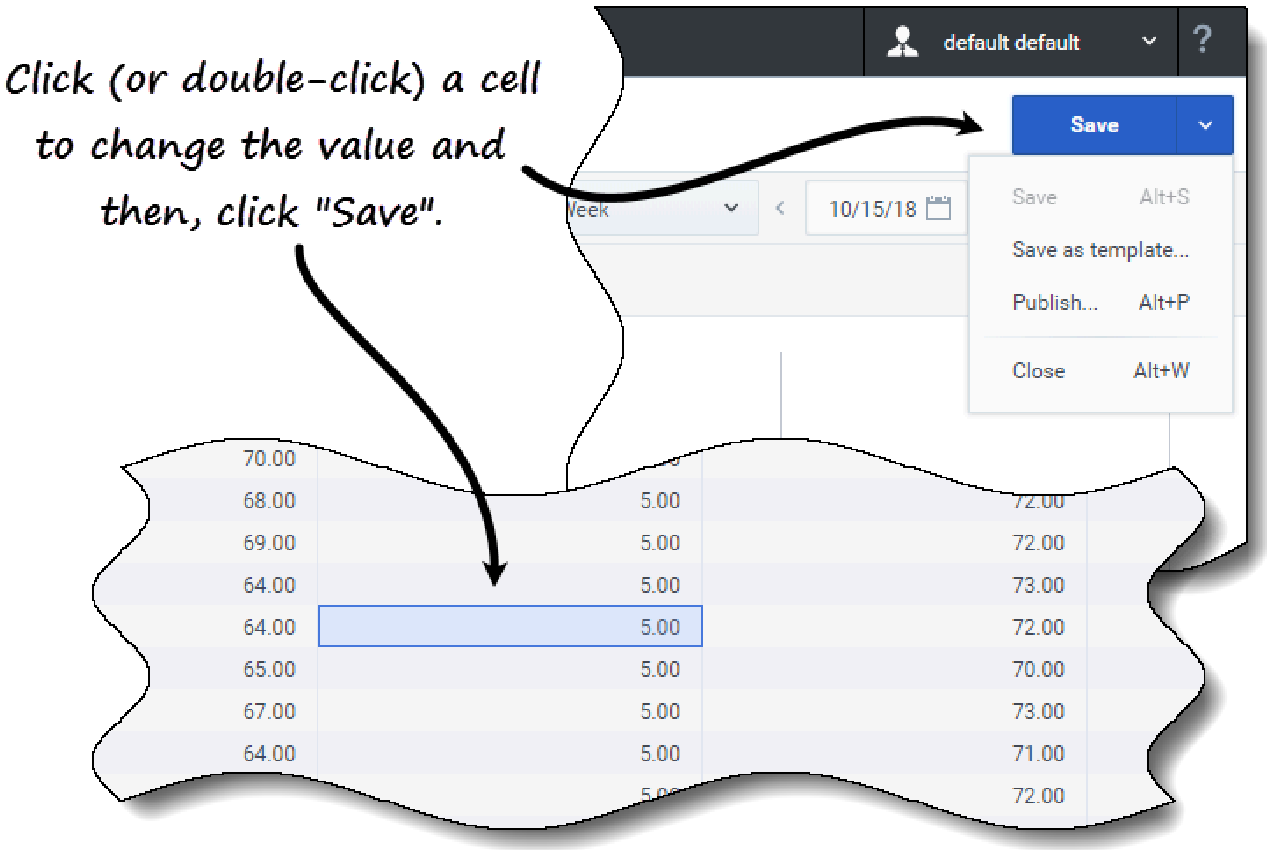
- If you enter a value similar to 1.$#!5, WFM converts it to 1.50%.
- If you enter a value a negative percentage, such as -88%, WFM converts it to 88%.
- If you enter a value greater than 99.99%, such as 899%, WFM converts it to 89%.
- If you enter a value with more than two digits after the decimal point, such as 40.009812%, WFM converts it to 40.00%.

Navigating the grid

In the grid, you can move from cell to cell by using the Enter or Shift+Enter keys on the keyboard. Click a cell and press:

- the Enter key to move the focus to the cell below the one selected.
- the Shift+Enter keys to move the focus to the cell above the one selected.

If you select a cell in the **Daily total** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.



Editing the shrinkage data in the grid

1. Double click the cell you want to change and enter a value.
2. When you have finished, in the upper-right corner of the view, click **Save** (or use the hotkey combo **Alt+S**).
   A message appears in the lower-right corner, indicating your changes were saved successfully.

Switch to another view without saving the changes and a dialog opens with the message *Would you like to save changes to* . Click one of the following options:

- **Save** to save the changes and switch to another view.
- **Discard** to discard the changes and switch to another view.
- **Cancel** to cancel the action, close the dialog, and return to the **Shrinkage** view.

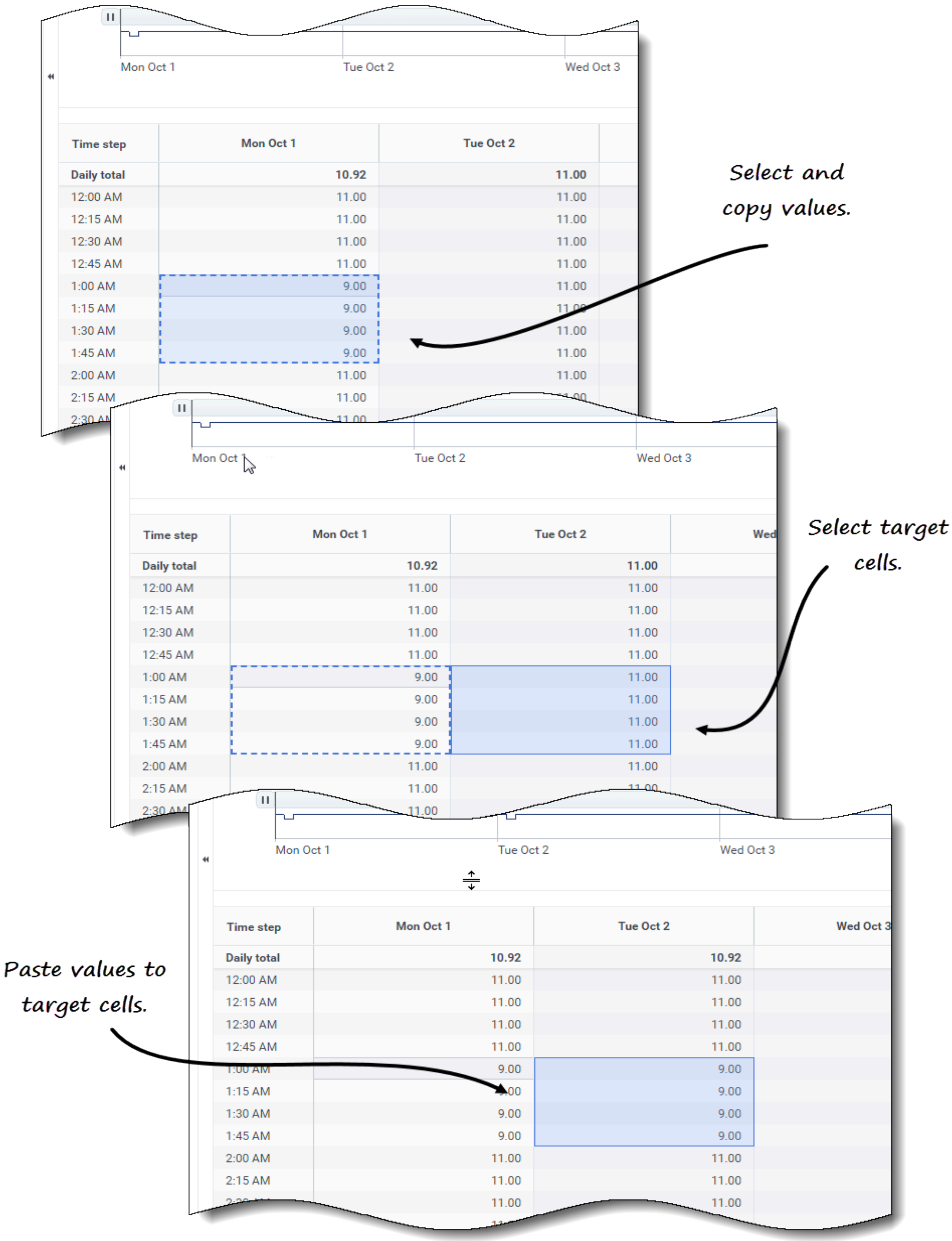
In the **Save** menu, you can also select:

- Publish (**Alt+P**) if you have modified the scenario data and want republish it.
- Save as template... to save this scenario as a template.
- **Close** (**Alt+W**) to close the scenario.

Selecting data to copy and paste

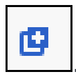
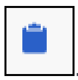
Tip

If you are unable to copy/paste, ask your administrator to confirm that your environment is using HTTPS secure connections to WFM.


Select and copy values.
Select target cells.
Paste values to target cells.

WFM enables you to copy and paste data to/from the shrinkage grid. Selecting data in the grid enables the **Copy** button. After copying, a message appears indicating that data was copied to the clipboard. Selecting other cells in the grid enables the **Paste** button.

Copying and pasting data in the grid

1. Open a scenario and select the **Shrinkage** view.
2. In the **Objects** pane, expand the list to select an activity or multi-site activity.
   If you select a multi-site activity, Paste is disabled. You can only paste activities.
3. In the grid, select the cells that you want to copy.
4. In the toolbar, click **Copy** .
5. In the grid, select the cells into which you want to paste.
6. In the toolbar, click **Paste** .
7. In the upper-right corner of the view, click **Save**.

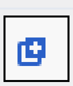
When copying/pasting values in the **Shrinkage** view:

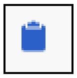
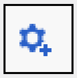
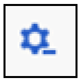
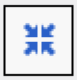
- You must copy/paste the **Daily totals/Average** row separately. It cannot be copied or pasted with other rows.
- Attempting to paste some letters, symbols, negative values, or values greater than 99.99 into the grid generates the message *Cannot paste invalid values*.
- You can copy/paste within the grid or to an external source, such as Excel or NotePad.
- Paste is disabled when:
  - The selected object is a business unit or site.
  - The **Shrinkage type** selected is **Grand total**, **Total Planned**, or **Total Unplanned**.
  - The selected cells for weekdays are outside the scenario weekdays.

You can also use the Ctrl-C and Ctrl-V key combinations on your keyboard to select data in the **Shrinkage** view grid for copying and pasting.

Using the Scenarios Shrinkage toolbar

Use the following buttons on the toolbar (above the graph) to modify and manage shrinkage data:

Icon	Name	Description
	**Copy**	Copies data selected in the grid to the clipboard.

Icon	Name	Description
	**Paste**	Pastes data from the clipboard to the selected area in the grid.
	**Add activities**	Opens the Add Activities dialog, enabling you to add activities to scenarios.
	**Remove activities**	Opens the Remove Activities dialog, enabling you to remove activities from scenarios.
	**Add shrinkage**	Opens the Add Shrinkage dialog, enabling you add shrinkage to Schedule State Groups that are associated with activities or multi-site activities.
	**Apply template**	Opens the Apply Template dialog, enabling you to add shrinkage to Schedule State Groups by applying a template.

Managing shrinkage data

Contents

Manage the shrinkage data for activities in forecast scenarios, in some cases by applying templates.

Related documentation:

-

In Workforce Management (WFM) you'll manage the shrinkage data (previously named *overheads*) in Forecast Scenarios, by adding, editing and deleting shrinkage associated with the Schedule State Group (SSG) for a specific activity. You can also apply templates to make adjustments to the shrinkage data.

Multi-site activities (MSA) use shrinkage information that is associated with Schedule State Groups from child activities.

Statistics appear in the **Shrinkage type** drop-down menu for the item that is selected in the **Objects** pane. If the item is:

- An activity, the menu lists all Schedule State Group shrinkage that is associated with the activity.
- A multi-site activity, the menu lists shrinkage for all Schedule State Groups that are associated with the child activities.

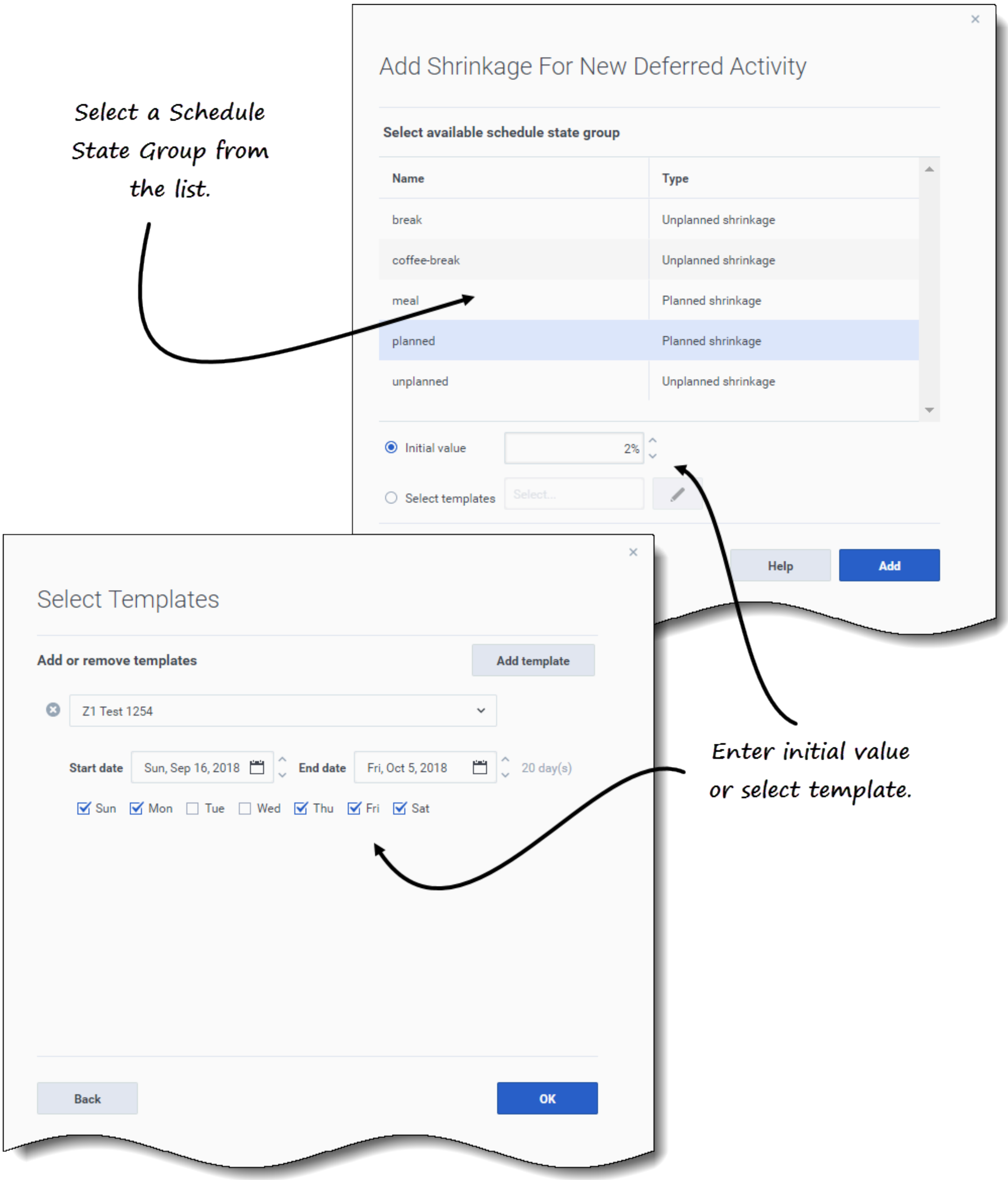
You must edit the shrinkage values for child activities of the MSA individually.

If you select an activity or MSA for which there are no available Schedule State Groups, after clicking **Add Shrinkage**, you'll see the message *There are no available schedule state groups* in the dialog.

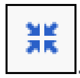
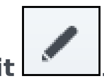
Adding and deleting shrinkage

Adding shrinkage in forecast scenarios means adding shrinkage values that are associated with a Schedule State Group (SSG) and a target, such as an activity. Deleting shrinkage means deleting these values in the **Shrinkage type** menu. Once you confirm the deletion of these values, the SSG is removed from the **Shrinkage type** menu. Use the procedures below to add and delete shrinkage.

Adding shrinkage to activities


Select a Schedule State Group from the list.
Add Shrinkage For New Deferred Activity
Select available schedule state group
Name
Type
break
Unplanned shrinkage
coffee-break
Unplanned shrinkage
meal
Planned shrinkage
planned
Planned shrinkage
unplanned
Unplanned shrinkage
Initial value
2%
Select templates
Select...
Help
Add
Select Templates
Add or remove templates
Add template
Z1 Test 1254
Start date
Sun, Sep 16, 2018
End date
Fri, Oct 5, 2018
20 day(s)
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Back
OK
Enter initial value or select template.

Adding shrinkage to an activity in a scenario

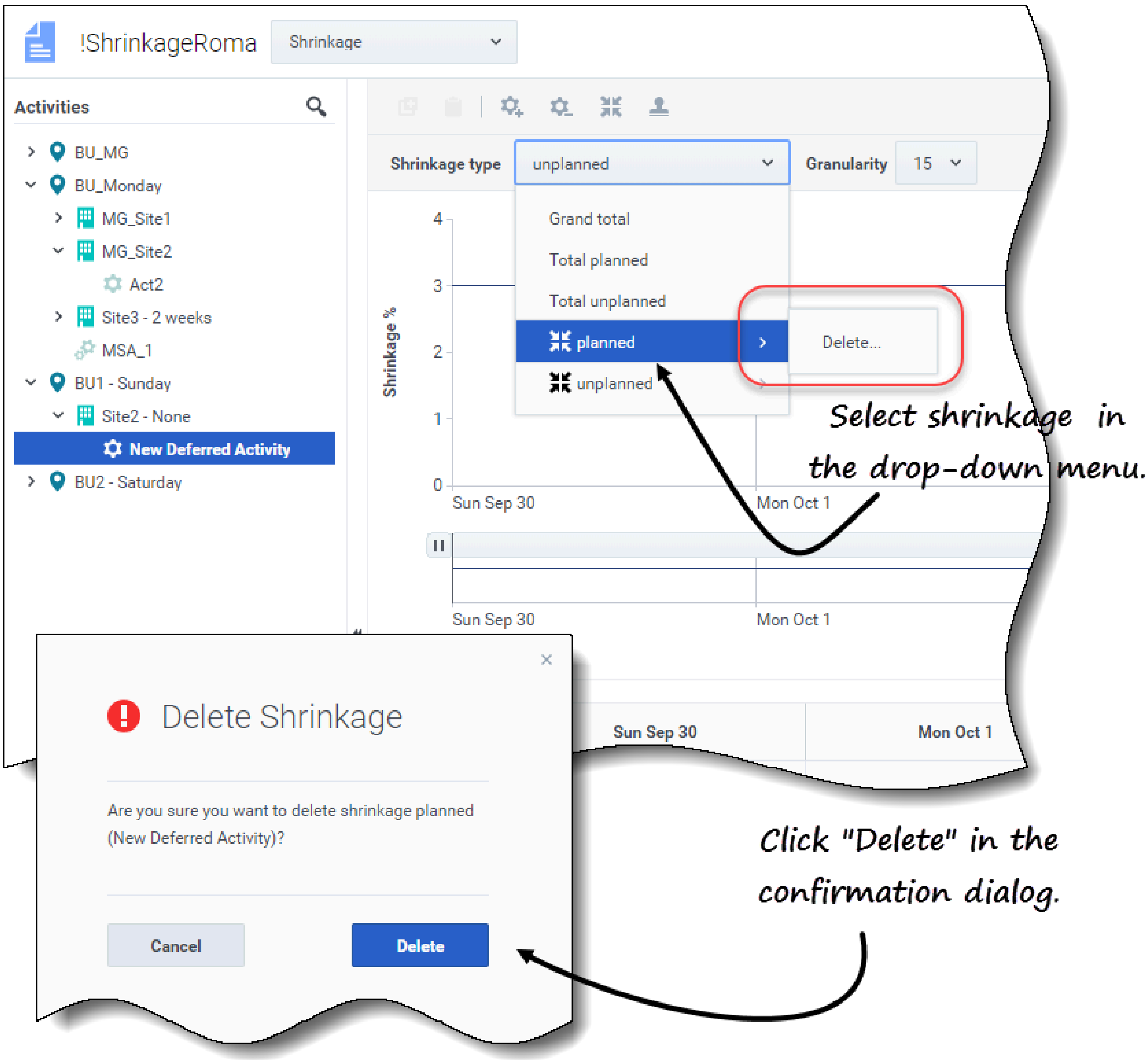
1. Open the Shrinkage view
2. In the **Objects** pane, expand business units and sites to select an activity.
3. In the toolbar, click **Add shrinkage** .
   The Add Shrinkage for Activity_name> dialog opens.
4. Select a Schedule State Group from the list.
5. Choose one of these options:
   - In the **Initial value** field, enter a percentage.
   - Click the **Select templates** radio button and click **Edit** .
     The Select Templates dialog opens.

Selecting a template

1. Select a template from the drop-down list.
2. Enter (or use the date selectors to adjust) the **Start date** and **End date**, if necessary.
3. Uncheck any days of the week that are not applicable to this template.
4. To add more templates, click **Add template**, repeating substeps 2 and 3 for each one.
5. Click **OK**.
   The wizard returns to the Add Shrinkage for Activity_name> dialog.
6. Click **Add**.
   WFM confirms that the shrinkage was successfully added, and the shrinkage appears in the graph and grid.

Click **Cancel** or **X** in the upper-right corner of the dialog to cancel the action and close the dialog.

Deleting shrinkage from activities

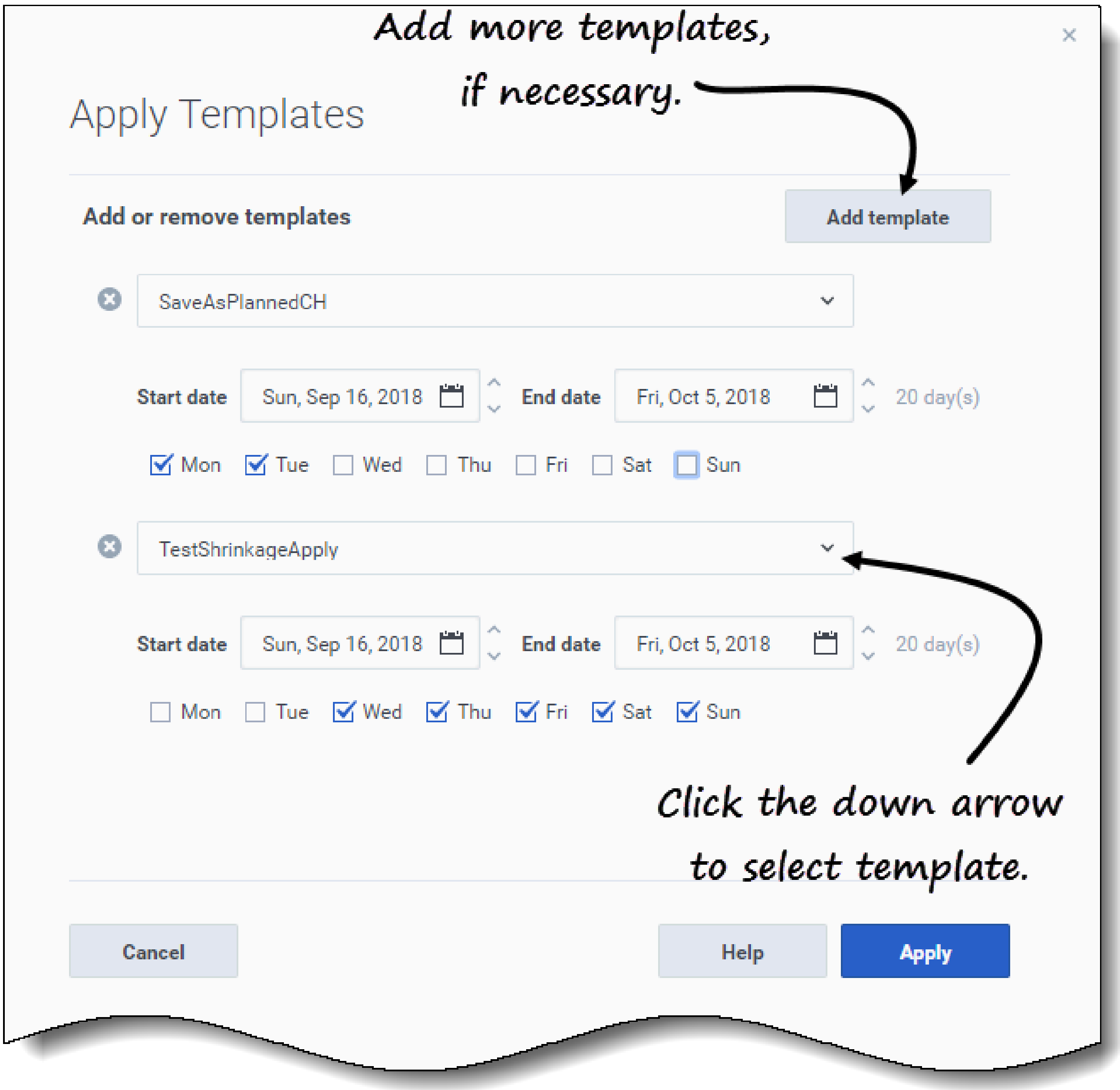


Deleting shrinkage from an activity in a scenario

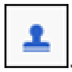
1. Open the **Shrinkage** view
2. In the **Objects** pane, expand business units and sites to select an activity.
3. Click the **Shrinkage type** drop-down menu and select the Schedule State Group you want to delete.
4. In the selected SSG's submenu, click **Delete**.

5. A confirmation dialog opens.
   Click Delete.
   The shrinkage is deleted from the graph and grid for the selected activity.
6. Alternatively, click **Cancel** to cancel the action and close the dialog.

Adding shrinkage by applying templates



Adding shrinkage to Schedule State Groups using a template

1. Open the **Scenario** > **Shrinkage** view
2. Click the **Shrinkage type** drop-down list to select a Schedule State Group.
3. Click **Apply templates** .
   The Apply Templates dialog opens.
4. In the **Select template** field, select the template you want to apply.
5. Change the start and end date, if necessary.
   Ensure the dates are not outside of the scenario start/end dates.
6. Uncheck any days of the week that you do not want impacted by this template.
7. To add more templates, click **Add template**, repeating steps 4 to 6 for each one.
8. Click **Apply**.
9. When the process is complete, click **OK**.

Click **Cancel** or **X** in the upper-right corner of the dialog to cancel the action and close the dialog.

Templates

Contents

Learn when and how to use different template types and understand the template data.

Related documentation:

-

Tip

This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

WFM Forecast templates help you create forecasts for sites or business units that have little or no historical data. In addition, there are other uses for templates. For example, you can create templates for service requirements, such as average speed of answer (ASA), and service level (SL). In those cases, forecast templates are used to apply different values for different periods of the day, instead of using a single value for the whole day.

Use the Forecast templates features to:

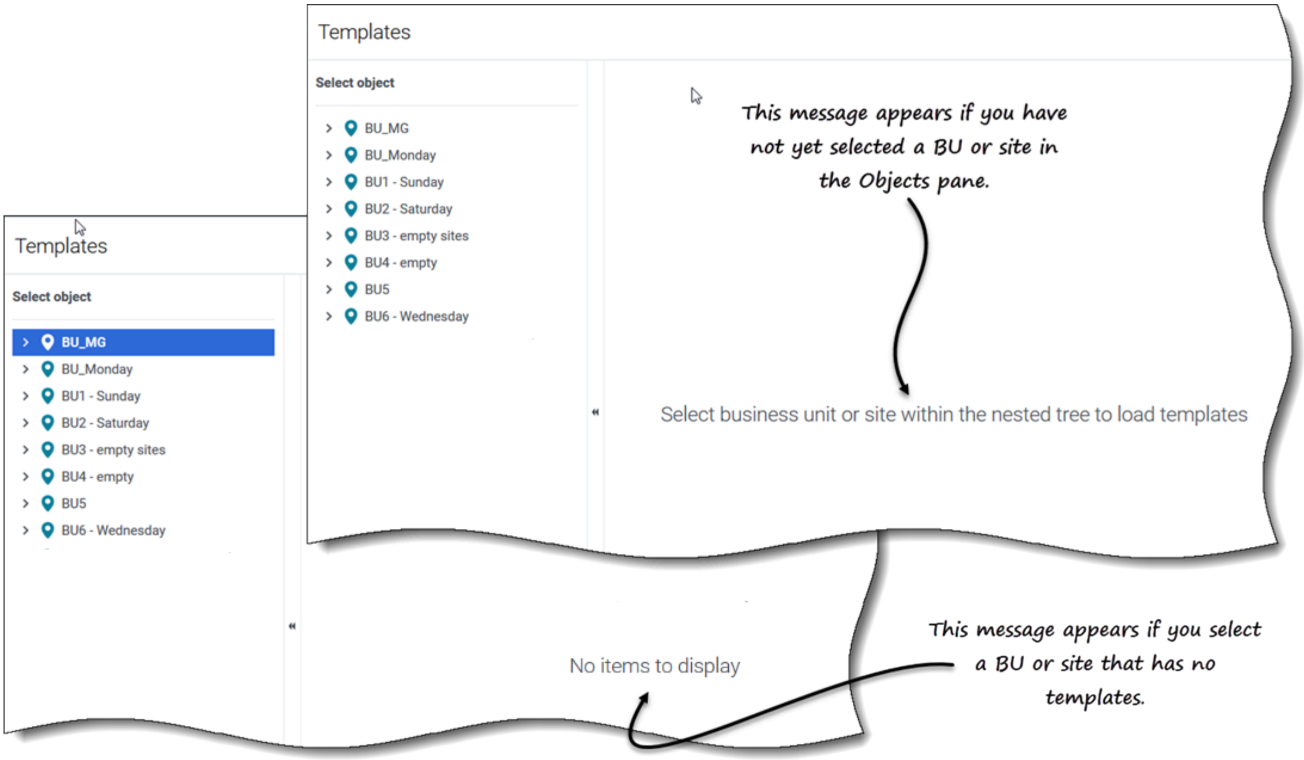
- Select and manage forecast templates.
- Edit template values and settings.
- View template values in a graph.
- Add or remove activities within templates.
- Create templates.
- Create templates based on existing data.

Tip

You must have the access permission to the **Templates** view before you can view, create, or modify templates. See also, the Tip about access permission in Navigating the Forecast views

When creating templates, you can copy and paste data between a grid and a spreadsheet. For example, you can copy and paste from a Scenario Volumes view or Scenario Staffing view.

Opening the Templates view

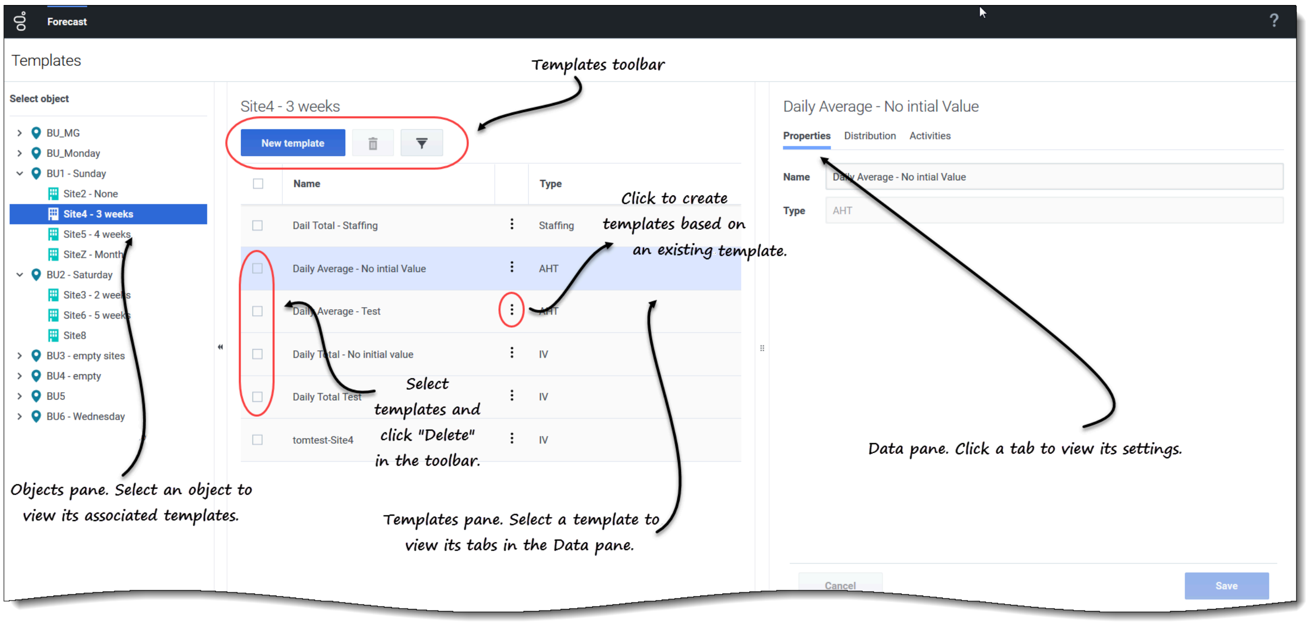


You create, edit, filter, and delete forecast templates in WFM's Forecast module, by selecting **Forecast** > **Templates**.

When you open this view initially, you might not see any templates listed (see figure). WFM displays a list of associated templates only after you select a business unit or site in the **Objects** pane.

If no templates exist for the selected object, you'll see the message *No items to display*. Either create a template for the selected object or choose another object to view it's templates.

Working in the Templates view



The **Templates** view is split into three panes. The **Objects** pane displays a hierarchical list of business units and sites in the enterprise. In this pane:

- Select a business unit or site (by clicking the arrow **>** beside the business unit) to see a list of templates for the selected object.

The **Templates** pane displays the name of the selected business unit or site and a table containing its templates. In this pane:

- Select a template to display its tabs in the **Data** pane.
- Create a template. Click **New template** in the toolbar.
If there are no templates for the selected object, the message *No items to display* appears in the middle of the pane.
- Delete templates. Check the boxes to select one or more templates and click **Delete** in the toolbar.
-  Filter the list of templates to display only the template types you want to see.
- Use the paging controls to navigate through lists of templates that are more than one page long.

In the **Data** pane, view or change the settings and controls for any of these three tabs (described below): **Properties**, **Distribution**, and **Activities**.

Understanding the template's data

The template data can be viewed and edited by using the following three tabs:

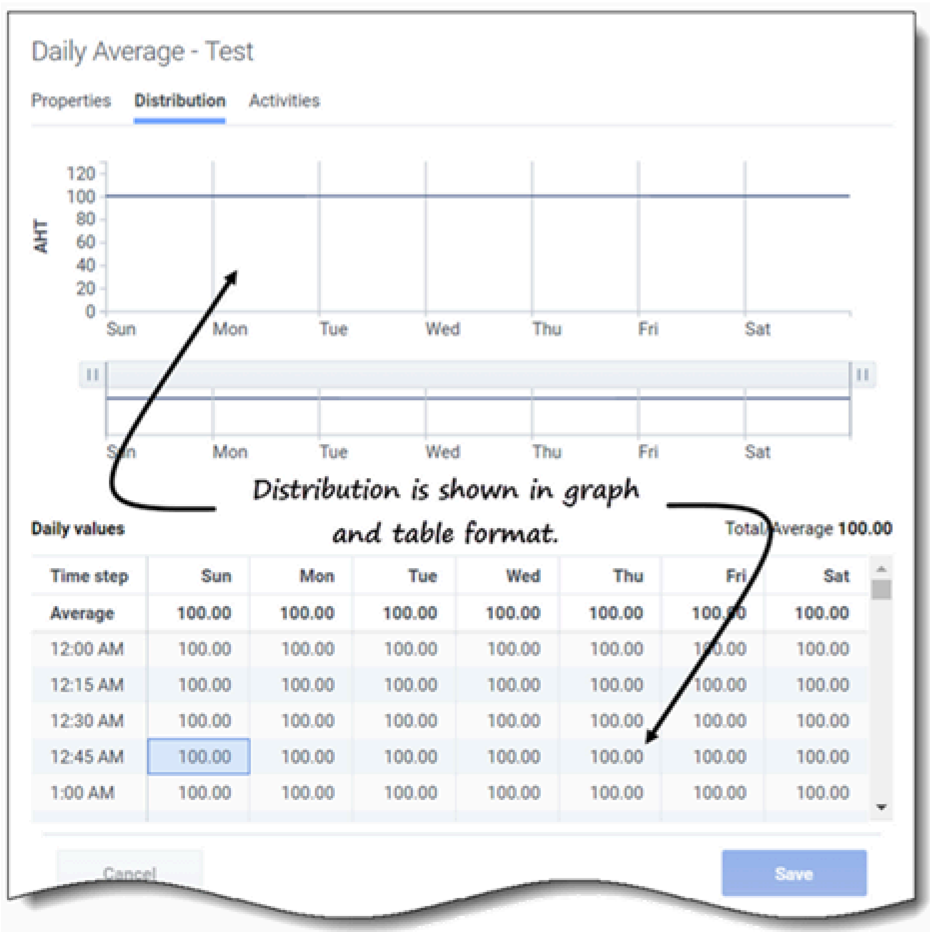
Properties tab

The **Properties** tab contains two fields:

- **Name**—The name of the forecast template.
- **Type**—The template type. You choose the template type when you are creating templates. You cannot edit this field.

The **Name** field is editable. Simply enter the new name and click **Save**.

Distribution tab



The **Distribution** tab displays a forecast template's values for a 7-day period in both graphical and table format. To adjust the graph's displayed time interval, use the horizontal sliders.

The graph adjusts to display only the selected days (to a minimum of 1 day) and divides them into timesteps, according to the number of days that are displayed.

In the grid, use the vertical scroll bar to see the following columns and rows:

- The **Time step** column is divided into 15-minute timesteps.
- The remaining columns show the days of the week.
- The top row shows is either the **Total** or **Average** daily value for each day of the week, depending on the template type you've selected.
- The **Total/Average** daily value is displayed to the far right, above the table.

This cells in the grid are editable. Simply enter new values and click **Save**.

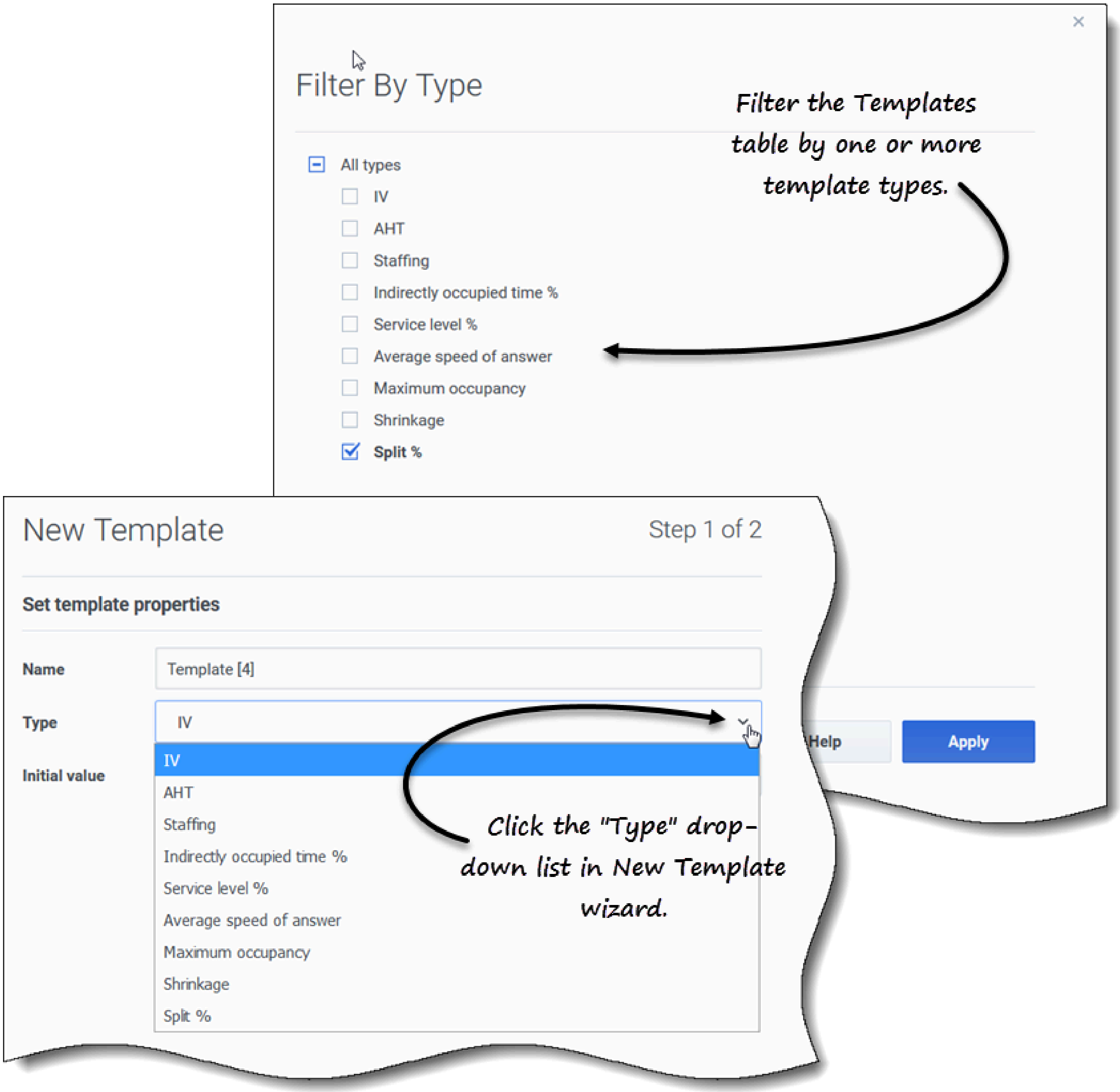
Activities tab

The **Activities** tab displays the activities associated with a forecast template in a hierarchical format.

Clicking the top-most check box selects all of the site's activities.

Activities selection is editable in this tab. Simply select or deselect one or more check boxes and click **Save**.

Selecting a template type



You select the template type when you are creating templates. Be sure to use acceptable values for each type.

You can filter the **Templates** grid by the following template types:

- **IV**—Represents interaction volumes by the number of interactions per timestep.
  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.
- **AHT**—Represents the average handle time, in seconds. See the IV description above.

- **Staffing**—Represented as the number of agents (full-time equivalents) to be scheduled for each timestep.
  This can be either calculated by WFM (Calculated Staffing) or set by the user (Required Staffing), or you can use both calculated and required values in a forecast. See Tip.
- **Indirectly occupied time %**—Represented as a percentage. See Tip.
- **Service level %**—Represented as a percentage. See Tip. at end of this topic.
- **Average speed of answer**—Represented in seconds. See Tip.
- **Maximum occupancy**—Represents the agent's maximum occupied time, as a percentage.
- **Shrinkage**—Represents the amount of shrinkage or overhead, as a percentage.
- **Split %**—Represents how multi-site activities are split, as a percentage.

Tip

Create these templates at the business unit level and apply them when building a multi-site activity staffing forecast.

Acceptable range of values in templates

Template type	Acceptable values
Interaction volumes (IV)	`0` to `999999999`
Average handle time (AHT)	`0.00` to `999999999.99`
Staffing	`0` to `999999999`
Indirectly occupied time %	`0.01` to `99.99`
Service level %	`0.01` to `100`
Average speed of answer (ASA)	`0.01` to `999999999.99`
Maximum occupancy %	`0.01` to `100`
Shrinkage %	`0.00` to `99.99`
Split %	`0.00` to `100.00`

Managing templates

Contents

Learn how use forecast templates to create forecasts for sites or business units that have little or no historical data.

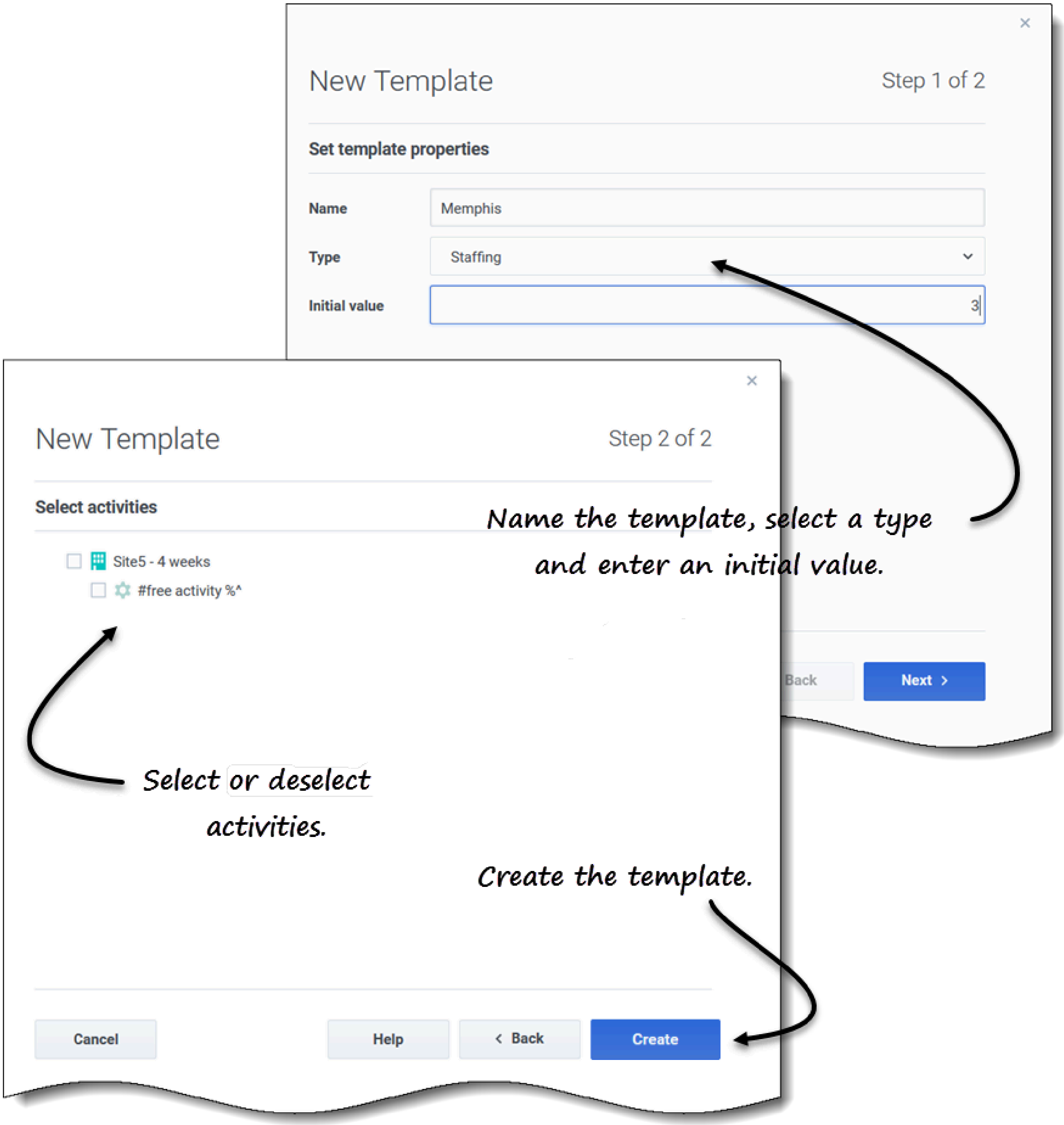
Related documentation:

-

This topic describes the Workforce Management (WFM) wizards, controls, and settings you'll use to view, create, and manage forecasting templates.

The templates you create using these procedures can be used only for the activities or multi-site activities (MSA) you select in Step 2 of wizards. If you select any other activity or MSA, you won't see the template.

Creating forecast templates



Creating a forecast template

1. In the **Forecast** > **Templates** view, select:
   - A business unit if you are creating the template for multi-site activities.
   - A site if you are creating the template for activities.

2. Click **New template**.
   Step 1 of the New Template dialog opens.
3. Enter a **Name** for the template (limited to 127 characters)
4. Select the template type from the **Type** drop-down list.
   See a list of template types here.
5. Enter a number in the **Initial value** text box.
   See the Tip below for more information.
6. Click **Next**.
7. In Step 2 of the dialog, select the activities or multi-site activities for this template.
8. Click **Create**.
9. When the confirmation message appears, click **OK**.
   Your template displays in the list of templates.

Tip

The initial value is a minimum value that applies to all timesteps. After you've created the template, edit it to adjust the precise values for each timestep.

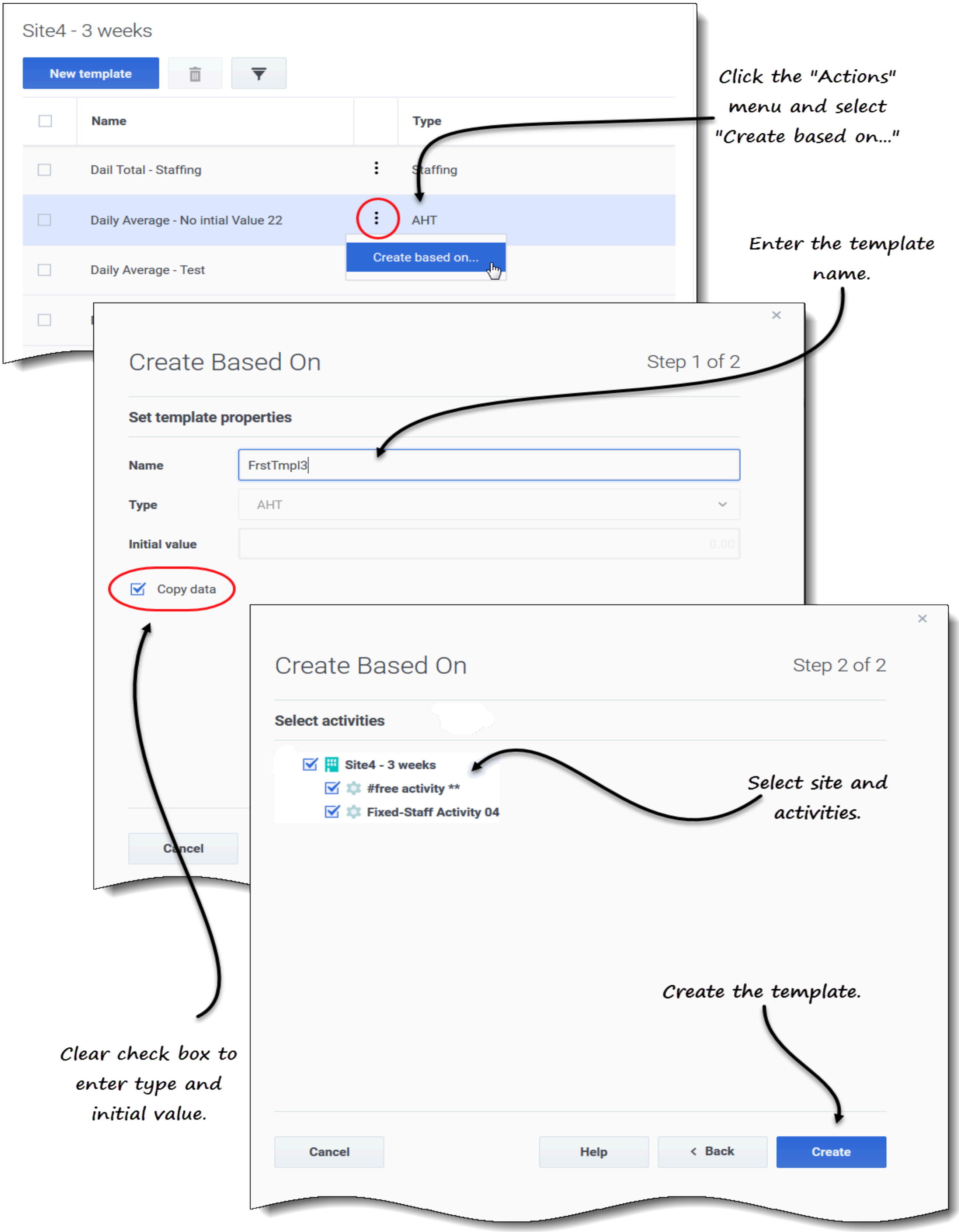
WFM Web interprets the initial value differently, depending on the type of template you choose. For example, templates of type **IV** (interaction volume) could have an initial value between `0` and 9999999 (calls per timestep). However, templates of type **Maximum occupancy** could have an initial value between `0.01` and `100.00` percent.

For more information about all acceptable values, see Acceptable values in templates.

Creating templates based on existing data

Use the Create Based On dialog to create a new forecast template from existing data.

When creating templates using this dialog, you'll notice (in Step 1) that the Type and Initial value fields are disabled and the Copy data check box is checked, by default. WFM assumes that you want to use the same data that was used in the source template. If you don't want to, simply uncheck the Copy data check box and change the template type and/or initial value.



Site4 - 3 weeks
New template
Name
Type
Dail Total - Staffing
Staffing
Daily Average - No intial Value 22
AHT
Daily Average - Test
Create based on...
Click the "Actions" menu and select "Create based on..."
Create Based On
Step 1 of 2
Set template properties
Name
FrstTmpl3
Type
AHT
Initial value
0.00
Copy data
Cancel
Enter the template name.
Create Based On
Step 2 of 2
Select activities
Site4 - 3 weeks
#free activity **
Fixed-Staff Activity 04
Select site and activities.
Create the template.
Clear check box to enter type and initial value.
Cancel
Help
Back
Create

Creating a template based on an existing data

1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. Choose a template, click **Actions** ⋮, and select **Create based on...**.
3. In Step 1 of the dialog, in the **Name** field, enter the template name (limited to 127 characters).
4. In the **Type** drop-down list, select the template type.
   See a list of template types here.
5. Enter a number in the **Initial value** field.
   See the Tip above for more information.
6. Remove the check mark in the **Copy data** check box if you do not want to copy data from the source (based on) template.
7. Click **Next**.
8. In Step 2 of the dialog, select the activities or multi-site activities for this template.
9. Click **Create**.
10. When the confirmation message appears, click **OK**.
    Your template displays in the list of templates.

Editing templates

In the Template Distribution grid, you can move from cell to cell by using the Enter or Shift+Enter keys on the keyboard. Click a cell and press:

- the Enter key to move the focus to the cell below the one selected.
- the Shift+Enter keys to move the focus to the cell above the one selected.

If you select a cell in the **Total** or **Average** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.

Staffing No IVlu1
Properties
Distribution
Activities
Name
Staffing No IVlu1
Type
Staffing
Edit the Name field.
Daily values
Total/Average 9
Time step
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Total
1.5
1.25
12:00 AM
12:15 AM
12:30 AM
12:45 AM
1:00 AM
6
5
Save
Site2 - None
#free activity
Fixed-Staff Activity 02
Select/deselect activities to edit.
Click cells in the grid to edit.
Click "Save" (or "Cancel").

Editing a forecast template

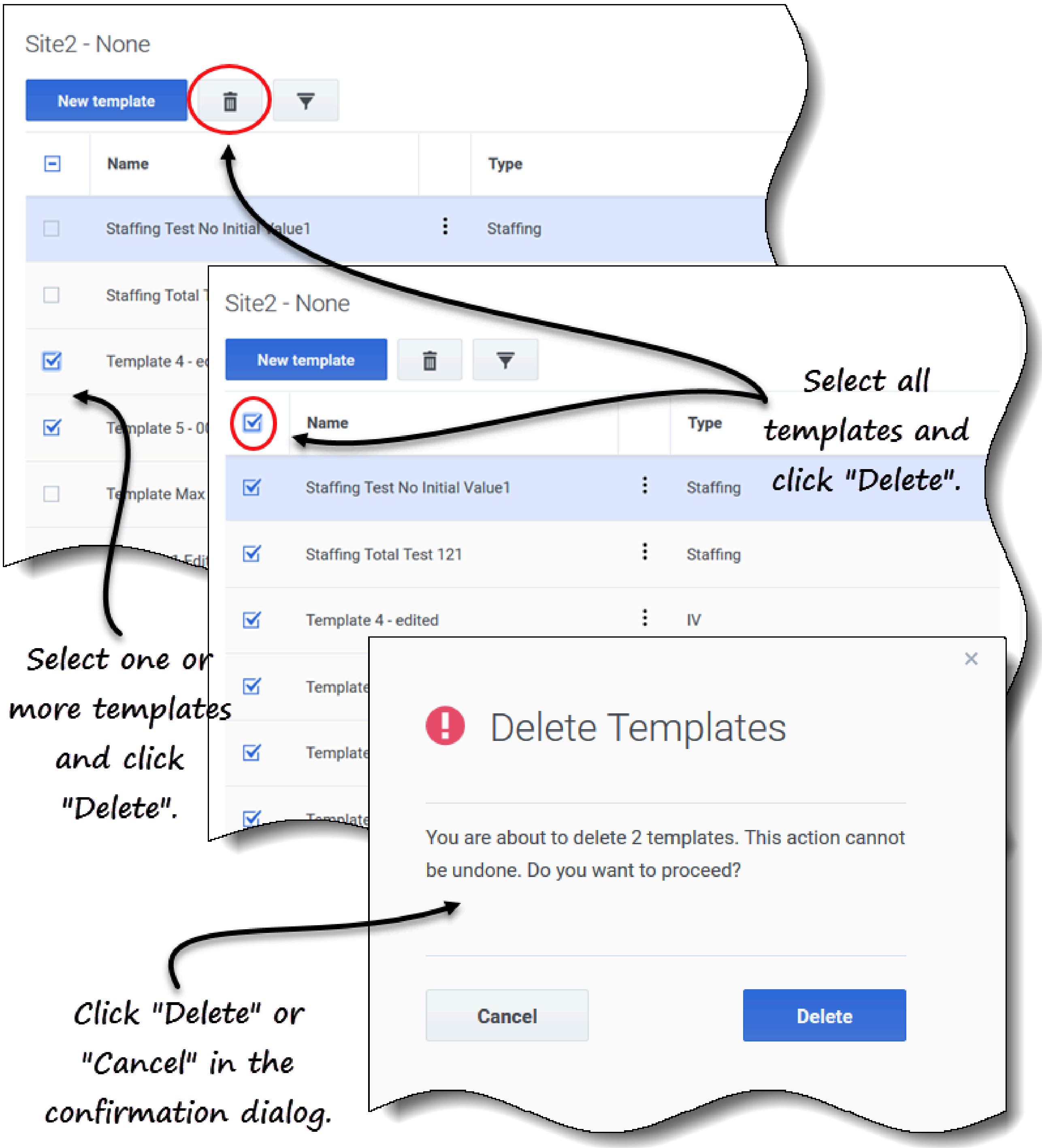
1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. In the table, select the template you want to edit.
   The Data pane opens, displaying 3 tabs.
3. Click any tab to change its settings:
   - In the **Properties** tab, enter a different name for the template. Note that you cannot change the **Type**.
   - In the **Distribution** tab, click any cell in the table to change its value. The **Total/Average** values change to reflect any changes you make to the cell values and vice versa.
   - In the **Activities** tab, add or remove activities by checking or clearing the check box next to the activity.
4. When you are finished editing, click **Save**.
   Alternatively, click Cancel at any time to discard any changes you've made.

When you are editing values in the Distribution grid, you can click the **Esc** key to cancel the action (WFM does not change the value).

If you select a business unit or site but do not select a template in the table, you'll see the message *Select template to edit* in the **Data** pane.

See also, Selecting data to copy and paste.

Deleting templates


Site2 - None
New template
Name
Type
Staffing Test No Initial Value1
Staffing
Template 4 - edited
IV
Staffing Total Test 121
Select all
templates and
click "Delete".
Select one or
more templates
and click
"Delete".
Delete Templates
You are about to delete 2 templates. This action cannot be undone. Do you want to proceed?
Cancel
Delete
Click "Delete" or
"Cancel" in the
confirmation dialog.

Deleting a template

1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. In the table, select the template that you want to delete.
3. In the toolbar, click **Delete** .

1. When the confirmation dialog opens, click **Delete** to proceed or **Cancel** to cancel the action.

Deleting multiple templates

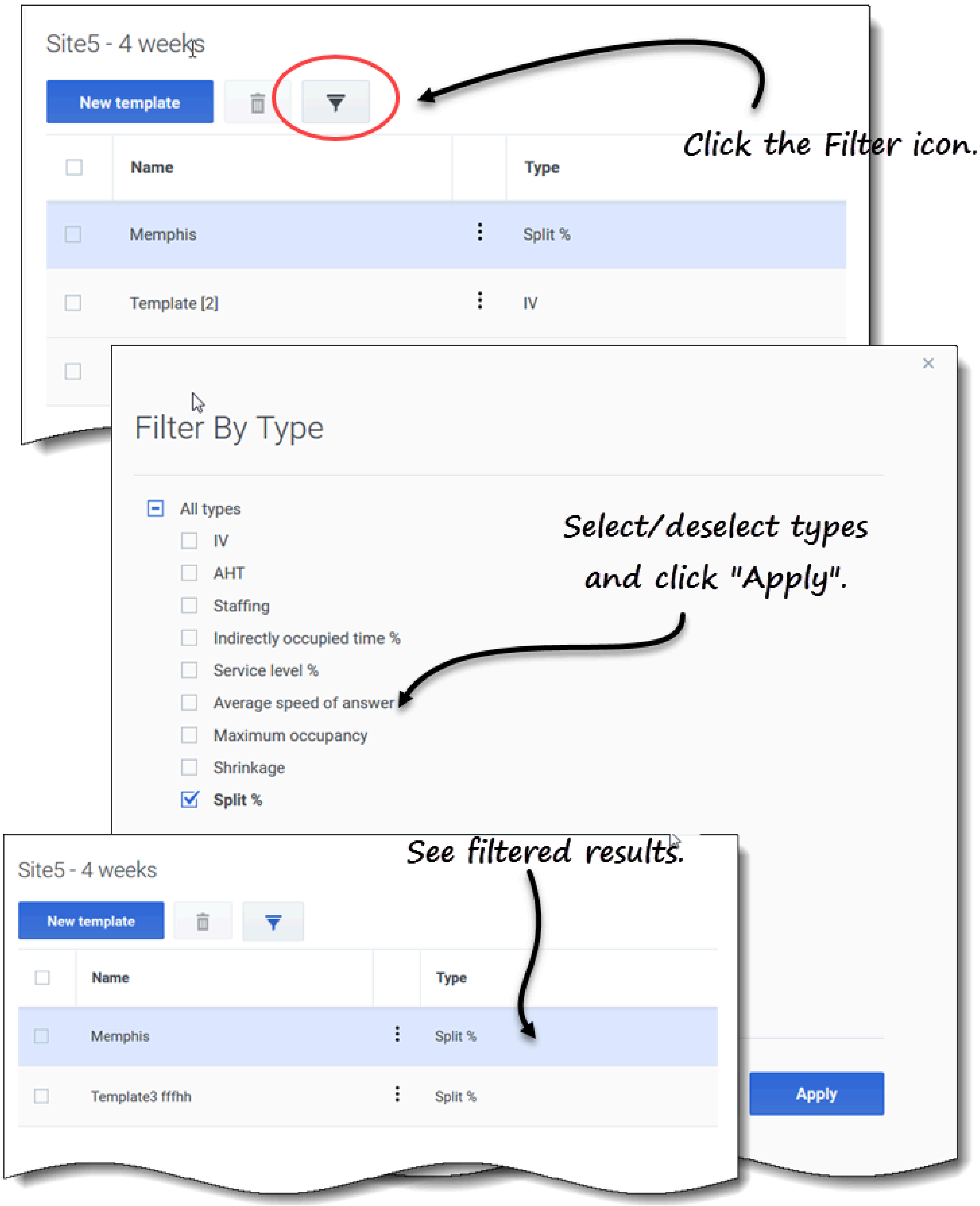
1. Select the templates you want to delete (using the check box beside each template).
2. Complete steps 3 and 4 in Deleting a template.

Deleting all templates in the table

1. Select the top-most check box in the column header (near the **Name** column header).
2. Complete steps 3 and 4 in Deleting a template.

If you are deleting a single template, the confirmation dialog contains the template name. If you are deleting multiple templates, the confirmation dialog states the number of templates being deleted.

Filtering templates in the table


Site5 - 4 weeks
New template
Click the Filter icon.
Name
Type
Memphis
Split %
Template [2]
IV
Filter By Type
All types
IV
AHT
Staffing
Indirectly occupied time %
Service level %
Average speed of answer
Maximum occupancy
Shrinkage
Split %
Select/deselect types
and click "Apply".
Site5 - 4 weeks
See filtered results.
New template
Name
Type
Memphis
Split %
Template3 fffhh
Split %
Apply

Filtering templates in the table

1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. In the **Templates** toolbar, click **Filter** .
   The Filter By Type dialog opens with all templates types selected by default.
3. Deselect any template types you do not want to see in the list and click **Apply**.

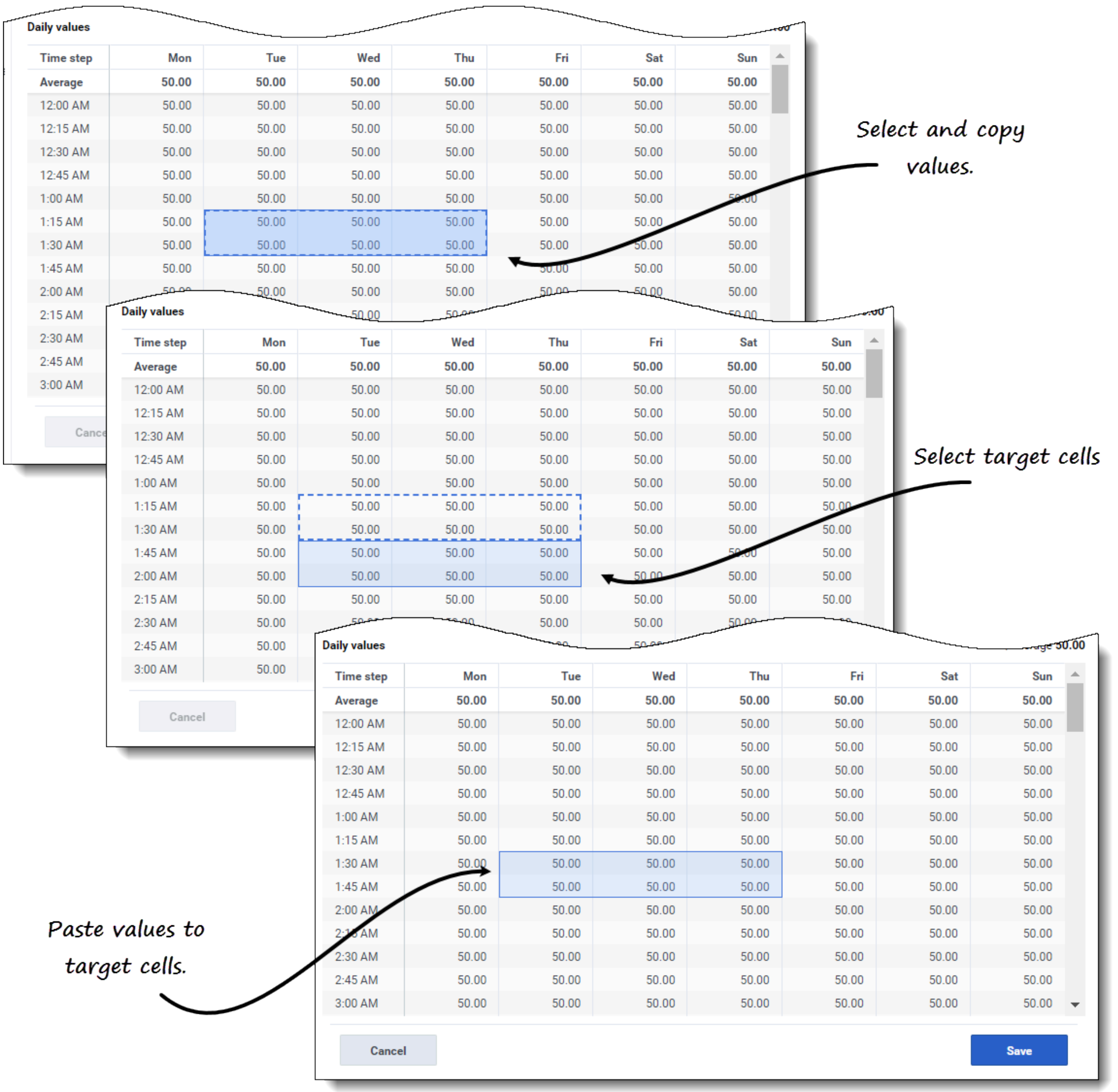
When WFM displays the filtered list of templates, the color of the **Filter** icon changes to blue. If you then select all template types and click **Apply**, the **Filter** icon changes to black.

If there are no templates found of the type you are filtering, you'll see the message *No items to display*.

WFM preserves your filtered selections if you navigate to another view and return to the **Templates** view.

Selecting data to copy and paste

> **Tip**
> If you are unable to copy/paste, ask your administrator to confirm that HTTPS secure connections to WFM are being used in your environment.



You can use key combinations on the keyboard and mouse to select data in the **Template** view's Distribution grid for copying and pasting. You can copy/paste within the grid and to/from a document (for example, Excel or NotePad).

For some key combinations, you must select the **Daily values** row and the **Timestep** column separately. They cannot be selected with other rows or columns in the grid. Also, timestep values can be pasted only to external sources (not into the grid). You cannot select, copy, or paste the Timestep header row (Mon , Tue. etc.).

When selected, cells are highlighted and bordered with a bold solid line. When copied to the clipboard, they are bordered with a dashed or broken line. Targeted or pasted cells are highlighted and bordered with a bold solid line.

The grid scrolls automatically when you select a range of cells using the Arrow, Home, End, Page Up, or Page Down key, or the Shift+Arrow, Shift+Home, Shift+End, Shift+Page Up, or Shift+Page Down keys.

Attempts to paste any of the following invalid values into the grid or **Daily totals/Average** row results in the message *Cannot paste invalid values:*

- Letters, special symbols, or negative values
- Decimal values for IV
- Values containing more than 9 digits for IV or Staffing
- Values that are out of range.

Shift+arrow keys

Click a cell in the grid and press:

- Shift+up arrow key to select additional cells above the selected cell.
- Shift+down arrow key to select additional cells below the selected cell.
- Shift+right arrow key to select additional cells to the right of the selected cell.
- Shift+left arrow key to select additional cells to the left of the selected cell.

Arrow keys

Click a cell in the grid and press:

- The up arrow key to select the cell immediately above it.
- The down arrow key to select the cell immediately below it
- The right arrow key to select the cell immediately to the right of it.
- The left arrow key to select the cell immediately to the left of it.

Click a range of cells in the grid and press:

- The up arrow key to select the cell immediately above the last cell in the range.
- The down arrow key to select the cell immediately below the last cell in the range.
- The right arrow key to select the cell immediately to the right of the last cell in the range.
- The left arrow key to select the cell immediately to the left of the last cell in the range.

Shift+Home, Shift+End

Click a cell in the grid and press:

- Shift+Home to select additional cells to the left of the selected cell.
- Shift+End to select additional cells to the right of the selected cell.

This key combination has no effect on **Time step** column.

Home, End keys

Click a cell or range of cells in the grid and press:

- The Home key to select the first cell in that row.
- The End key to select the last cell in that row.

Shift+Page Up, Shift+ Page Down

Click a cell in the grid and press:

- Shift+Page Up to select all cells above the selected cell.
- Shift+Page Down to select all cells below the selected cell.

This key combination has no effect on **Daily values** row

Page Up, Page Down

Select cells in the grid, and press:

- Page Up to select the first cell in that column within the visible grid area.
- Page Down to select the last cell in that column within the visible grid area.

Clicking these keys selects only the cells within the visible area of the grid. Click these keys more than once to select cells beyond the visible area.

Select a range of cells in the **Daily totals** row and press:

- Page Up to select the first cell within the selected range.
- Page Down to select the last cell within the selected range.

Ctrl+A

- Click any cell in the grid and press Ctrl+A—All cells in the grid are selected.
- Click any cell in the **Timestep** column and press Ctrl+A—All cells in the column are selected.
- Click anywhere in the **Daily totals/Average** row and press Ctrl+A—The entire row is selected.

Drag mouse or mouse pad

- Click any cell in the grid and hold down the right mouse key while dragging the mouse right, left, up, down, or any combination of directions. The range of cells is selected.

- Click any cell in the **Time step** column and hold down the right mouse key while dragging the mouse up or down. The range of cells in the column is selected.
- Click anywhere in the **Daily values** row and hold down the right mouse key while dragging the mouse left or right. The entire row is selected.

When dragging the mouse, if cells are selected beyond the visible area of the grid, the grid adjusts and autoscrolls to display the selected cells.

Shift+ mouse-click

- Hold down the Shift key and click any cell in the grid. Using the mouse, click anywhere in the grid in any direction. The range of cells is selected.
- Hold down the Shift key and click any cell in the **Time step** column. Using the mouse, click anywhere in the column, up or down. The range of cells is selected.
- Hold down the Shift key and click anywhere in the **Daily totals/Average** row. Using the mouse, click anywhere in the column, right or left. The entire row is selected.

Ctrl-C, Ctrl-V

Select cells in the grid, and press:

- Ctrl-C to copy values in the grid. The message *Copied to clipboard* appears. Click **X** to close it.
- Crtl-V to paste values in an Excel spreadsheet or a text editor such as, NotePad.

If more cells are copied than there are cells to paste into, WFM extends the number of cells/column/rows to accommodate the data being pasted.

Overlays

Contents

Learn how overlays impact forecast predictions, and understand overlay properties and data.

Related documentation:

-

Tip

This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

In WFM, using overlays (previously named *factors*) enable you to *factor in* and track events that might affect interaction volumes. Each event in an overlay represents an abnormality in historical data or in the future—that is, a fluctuation in interaction volumes (IV) or average handling time (AHT) that is not a usual seasonal, intra-week, or intra-day trend. Events that point to the same kind of abnormality, one that has happened multiple times in the past or can happen in the future, can be arranged into groups that are simply called *overlays*. The most common overlay examples are sales promotions, advertising campaigns, and catalog drops.

Tip

You must have access permission to the **Overlays** view before you can view, create, or modify overlays. See also, the Tip about access permission in Navigating the Forecast views

Impact of overlay events on prediction data

It's important to understand the impact that overlays events make on prediction data. A forecast's prediction data is directly impacted when a specific overlay event occurs over a prediction interval. WFM uses one of two calculations to determine an overlay's impact on prediction data:

- **Multiplicative**—Increase (or decrease) every step of predicted data by a percentage. The percentage is defined by overlay impact distribution, multiplied by the *strength* of the event. The duration of the interval is affected by event changes.
- **Overriding**—Re-distribute (but does not change) the volume of an event's interval. The total volume does not change, but it might be moved from one event-step to another.

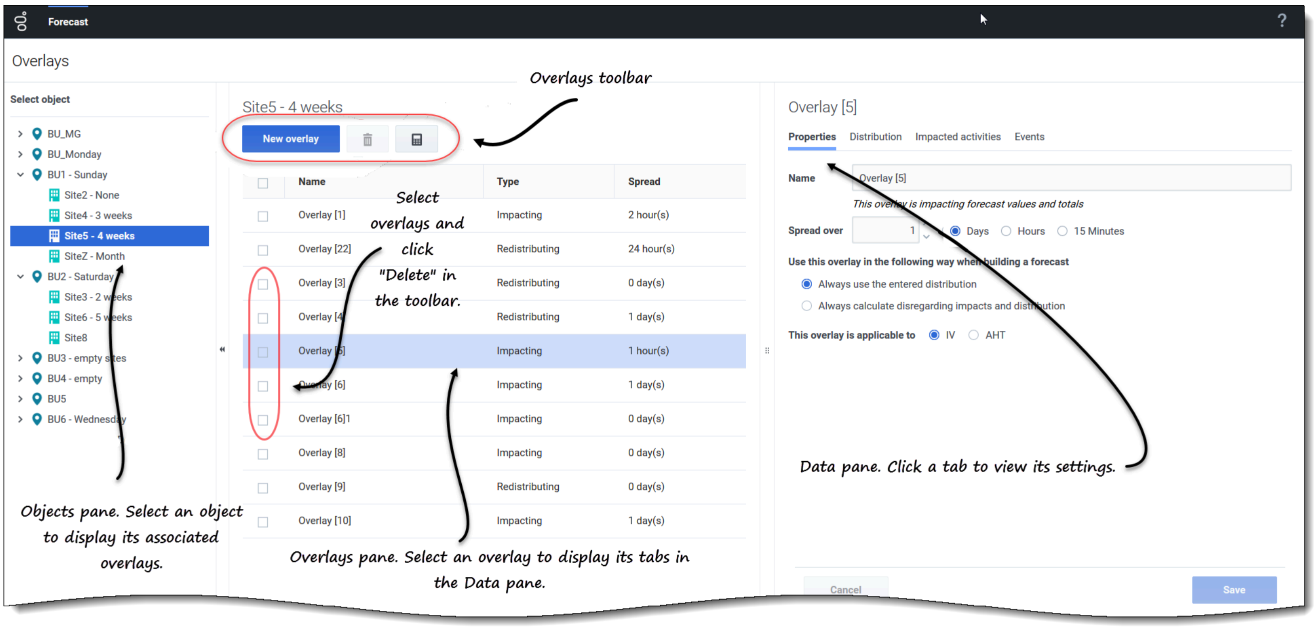
For more information about overlay types and examples, see the Overlays Primer in the *Workforce Management Administrator's Guide*.

Opening the Overlays view

Create, edit, and delete overlays in WFM's Forecast module, by selecting **Forecast** > **Overlays**.

When you open this view initially, you might not see any overlays listed (see figure). WFM displays a list of associated overlays only after you select a business unit or site in the **Objects** pane. If no overlays exist for the selected object, you'll see the message *No items to display*. Either create an overlay for the selected object or choose another object to view it's overlays.

Working in the Overlays view



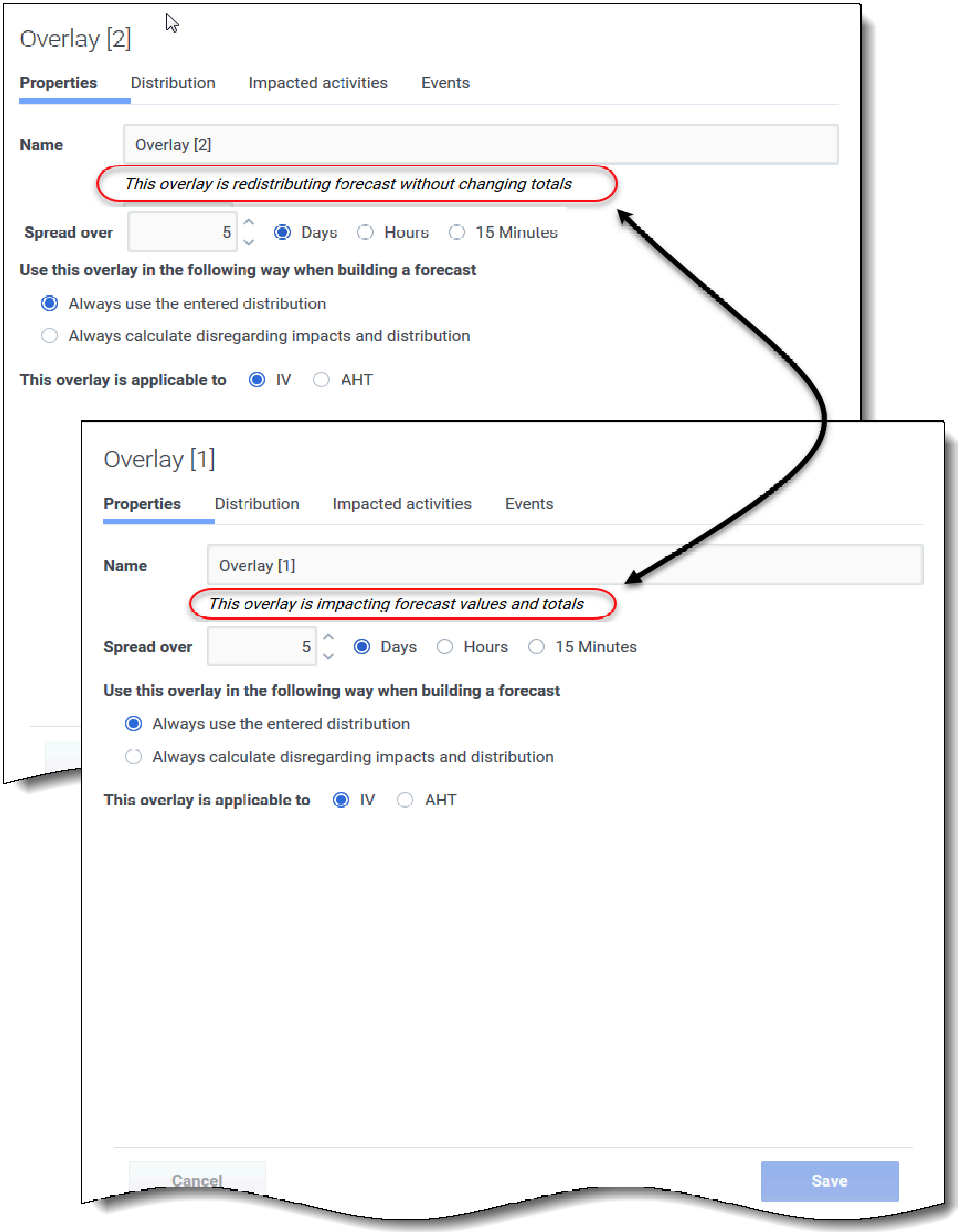
The **Overlays** view is split into three panes:

- **Objects** pane—Displays a hierarchical list of business units and sites in the enterprise. In this pane:
  - Select a business unit or site (by clicking the arrow **>** beside the business unit) to see a list of overlays for the selected object.
- **Overlays** pane—Displays the name of the selected business unit or site and a table containing its overlays. In this pane:
  - Select an overlay by type (Impacting or Redistributing) to display the tabs in the **Data** pane.
  - Create an overlay, click **New overlay** in the toolbar.
    If there are no overlays for the selected object, the message *No items to display* appears in the middle of the pane.
  - Delete overlays, check the boxes to select one or more overlays and click **Delete** in the toolbar.
- **Data** pane—Displays four tabs for the selected overlay: Properties, Distribution, Impacted activities, and Events. In this pane:
  - View or change the settings in any of these tabs.
    The tab settings are described below.

Understanding the overlay's data

When you select an overlay in the **Overlays** pane, the four tabs associated with the overlay display in the **Data** pane. Click the Properties, Distribution, Impacted activities, or Events tab to display the settings described in this topic.

Properties tab

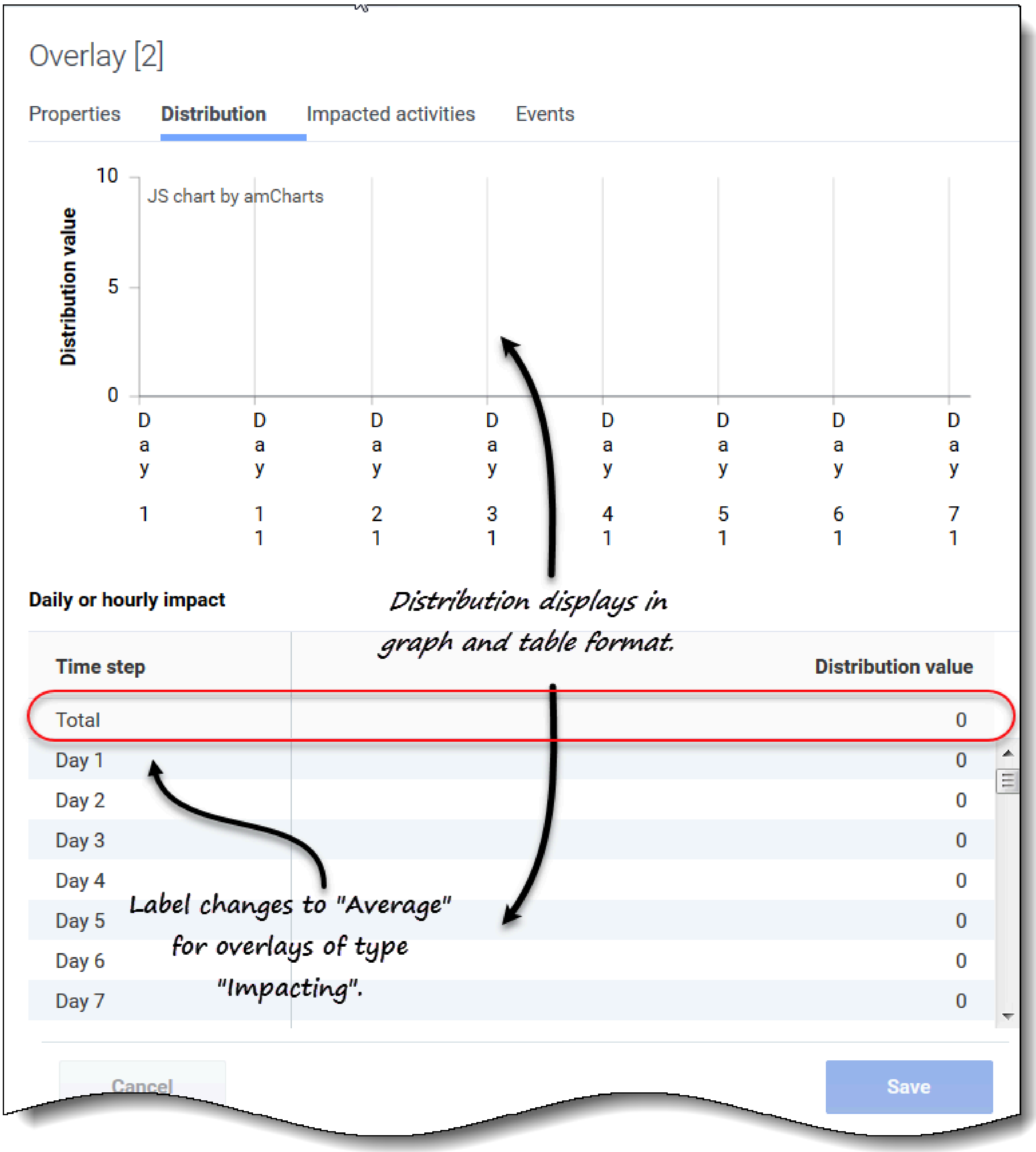

Overlay [2]
Properties
Distribution
Impacted activities
Events
Name
Overlay [2]
This overlay is redistributing forecast without changing totals
Spread over
5
Days
Hours
15 Minutes
Use this overlay in the following way when building a forecast
Always use the entered distribution
Always calculate disregarding impacts and distribution
This overlay is applicable to
IV
AHT
Overlay [1]
Properties
Distribution
Impacted activities
Events
Name
Overlay [1]
This overlay is impacting forecast values and totals
Spread over
5
Days
Hours
15 Minutes
Use this overlay in the following way when building a forecast
Always use the entered distribution
Always calculate disregarding impacts and distribution
This overlay is applicable to
IV
AHT
Cancel
Save

The **Properties** tab settings and controls are described as follows:

- **Name** *field*—You can edit the name in this field.
- **This overlay is** *label*—You'll see one of the following labels just below the **Name** field, depending on the settings you chose when you created the overlay:
    - **This overlay is 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.
    - **This overlay is redistributing forecast without changing totals**—Specify that this overlay must preserve a forecast's total for a 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 the **Days**, **Hours**, or **15 Minutes** radio button. The value must be greater than `0` (zero) and the default is set during creation.
- **Use this overlay in the following way when building a forecast** *radio button group*—One of these two settings will be selected:
    - **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 button group*—One of the following settings will be selected:
    - **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

The settings you see on the **Distribution** tab depend on the choices you made in step 1 of the **New Overlay** wizard or in the overlay's Properties tab. Specifically, this tab is disabled if **Always calculate disregarding impacts and distribution** was selected in either place.



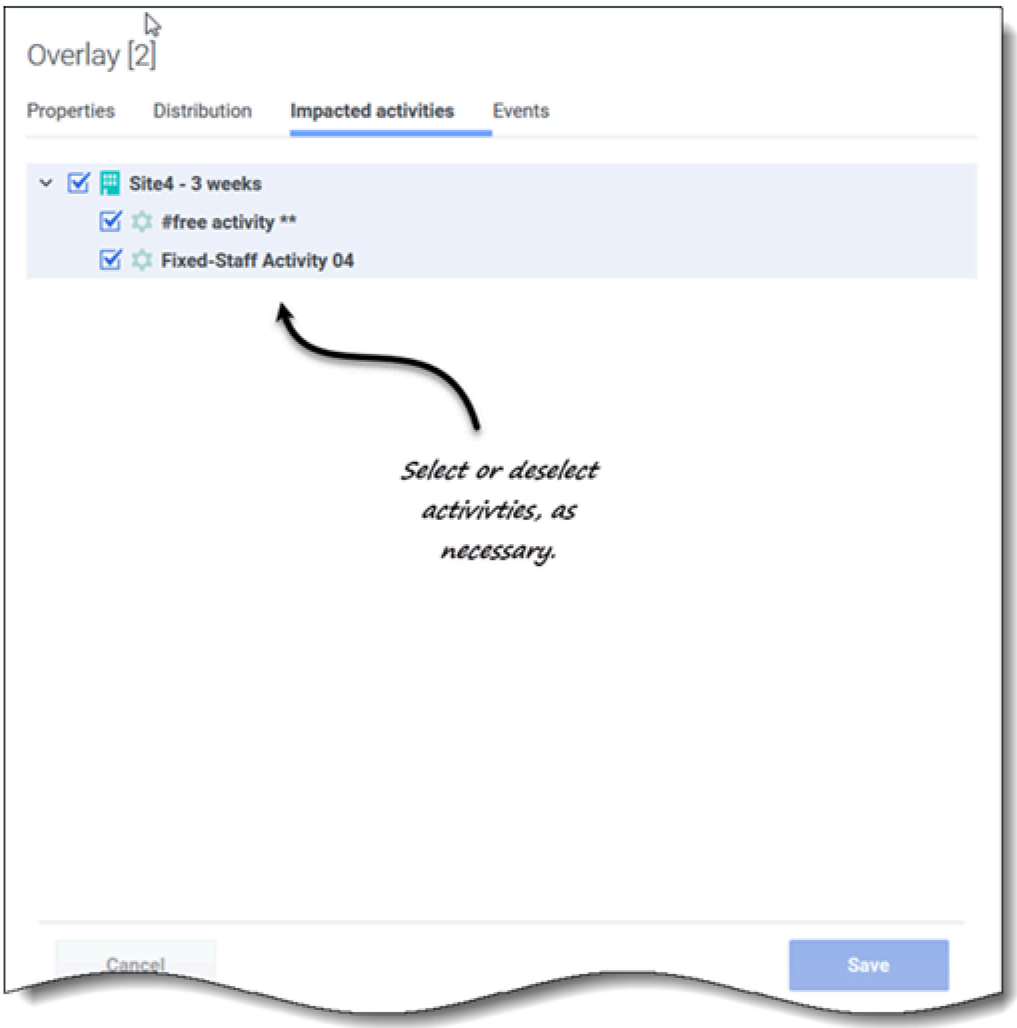
If you selected **Always use the entered distribution** when creating the overlay:

- **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. It contains the following columns in the

Daily or hourly impact section:

- **Timestep**—Each row displays an increment during which the overlay will be in effect. The actual increment (timestep, day, or hour) is set in Properties tab.
- **Distribution value**—Displays the distribution value of each increment. The default value in each cell is `0`.
  If the overlay is of the type:
  - **Impacting**—You can enter values from `-100` to `9999` into the grid. The top-most row in the shows the **Average** value of all timesteps.
  - **Redistributing**—You can enter a percentage into the grid from `0` to `100`. The top-most row in the grid shows the **Total** value of all timesteps.
    If the Total does not equal 100 %, you will see a warning and will not be able to save your changes to the overlay.

Impacted activities tab

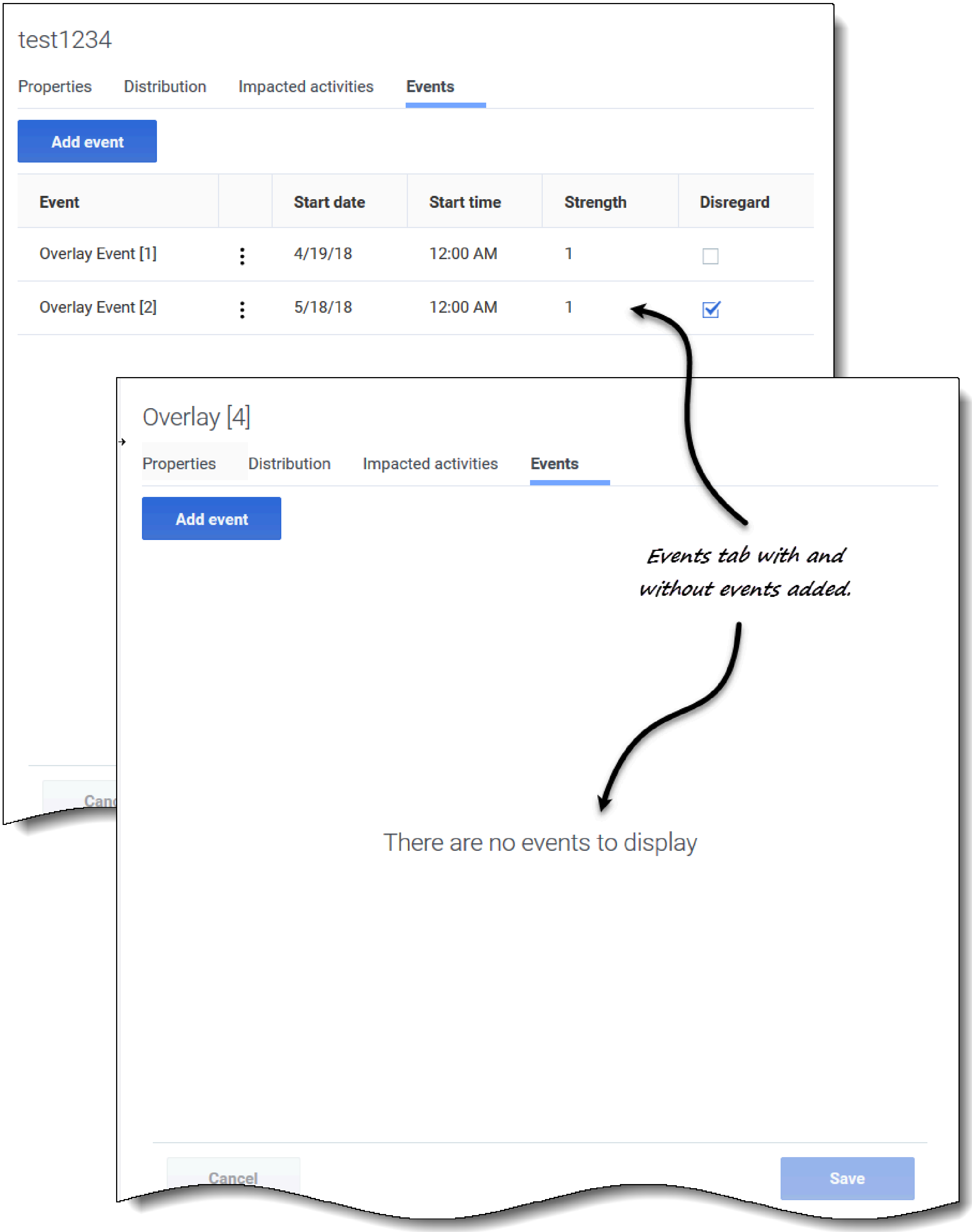


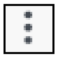
This tab lists all activities that correspond to the business unit or site that was selected in the **Object** pane.

- Select one or more activities that will be impacted by the selected factor.
- Clear all check boxes to specify no impact.

Events tab

If there are no events for the selected overlay, you'll see only the Add events button and the message There are no events to display. If events have been added, you'll see a grid listing all events for the overlay, one per row. You can edit the value in every cell of this grid by clicking **Actions** > **Edit**. The grid includes the following columns:


test1234
Properties
Distribution
Impacted activities
Events
Add event
Event
Start date
Start time
Strength
Disregard
Overlay Event [1]
4/19/18
12:00 AM
1
Overlay Event [2]
5/18/18
12:00 AM
1
Overlay [4]
Properties
Distribution
Impacted activities
Events
Add event
Events tab with and without events added.
There are no events to display
Cancel
Save

- **Event**—The name of the event.
-  **Actions** *icon*—Clicking this icon opens a drop-down menu containing two actions for selection: **Edit** and **Delete**.
- **Start date**—The start date of the event.
- **Start time**—The start time of the event.
- **Strength**—A coefficient (or multiplier) that measures the final impact of an event. The range is any positive value (greater than zero), up to nine digits, and two decimals.
- **Disregard**—If the check box is checked, the event disregards historical data. If unchecked historical data is considered. See Ignoring historical data.

The **Events** tab includes the following controls:

- **Add event** *button*—Click to add an event.
- **Cancel** *button*—Click to cancel and discard changes.
- **Save** *button*—Click to save changes.

Ignoring historical data in overlays

Any event under an overlay type may have the **Ignore Historical Data** flag set, which specifies whether the historical-data interval data that is covered by that event is used in calculations of volume prediction or overlay impact (see Calculating Overlay Impact).

If an event does not have the **Ignore Historical Data** flag set, then the data that is covered by the event is considered for prediction. There is no additional processing of historical data that is affected by the event, other than ignoring it or using it.

Calculating an overlay's impact

The impact of an overlay is determined by analyzing historical data and by using WFM's prediction algorithm. The algorithm analyzes the period of historical data, which contains one or more events of overlay that are to be calculated.

Overlays can be precalculated before starting volume forecasting or during volume forecasting (see Event impact distribution). Given the same historical data and using the same method, the results should be identical.

Multiplicative overlays are calculated by separating the seasonal component (yearly, daily, or intra-day) from the event impact for each event of the overlay in the given historical data. Then, the impact is divided by event strength and averaged. When the impact is applied to an event on the prediction interval, it is multiplied by the strength of that event.

In **Overriding Overlay**, the percentage of each event-step in the total of the whole event period is calculated for each event, and then averaged. See the following example:

A historical period has two events in a daily overlay, which is 3 days long. The days of the first event are `150`, `200`, `150` (`30%`, `40%`, and `30%` of the total, respectively), and the days of the second event are `150`, `150`, `200` (`30%`, `30%`, and `40%` of the total, respectively). Each event-step (in this case, a day) is averaged individually, and the overlay is calculated as `30%`, `35%`, `35%`, respectively.

Managing overlays and events

Contents

Create and manage overlays and overlay events.

Related documentation:

-

Workforce Management (WFM) makes it easy to forecast and manage overlays and events in the **Forecast** > Overlays view, by enabling you to:

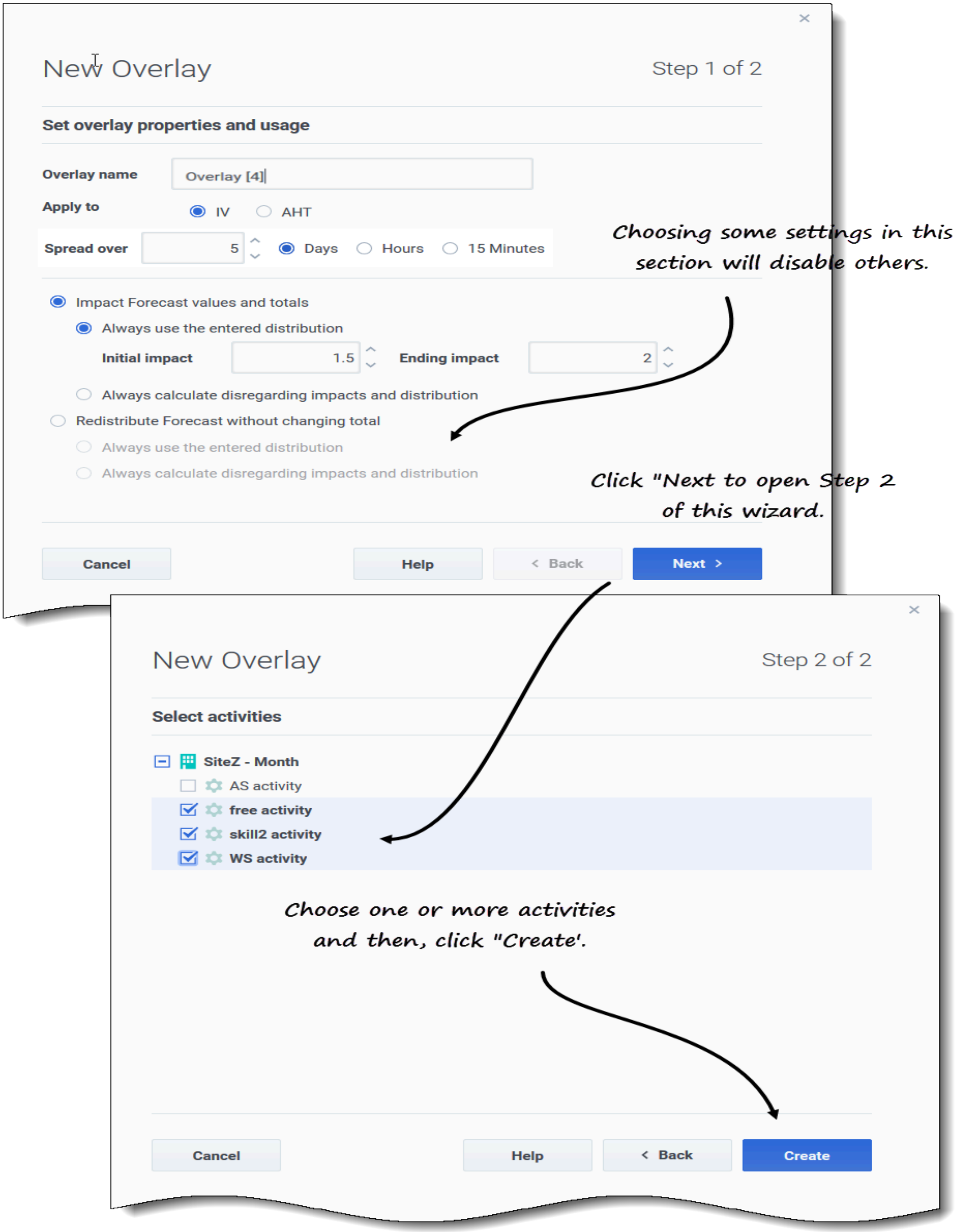
- Create and delete overlays
- View and edit overlay data
- Add and delete overlay events
- View and edit event data
- Select overlay data to copy and paste
- Calculate the distribution in overlays

Tip

You must have the **Overlays** security permission to see **Overlays** in the **Forecast** menu. Without this permission, you cannot create overlays and events, nor access **Overlays** using a bookmarked URL. See "Forecast Role Privileges" in the *Workforce Management Web for Supervisors (Classic) Help*.

Creating overlays

Use the **New Overlay** wizard to guide you through a simple two-step process.


New Overlay
Step 1 of 2
Set overlay properties and usage
Overlay name
Overlay [4]
Apply to
IV
AHT
Spread over
5
Days
Hours
15 Minutes
Impact Forecast values and totals
Always use the entered distribution
Initial impact
1.5
Ending impact
2
Always calculate disregarding impacts and distribution
Redistribute Forecast without changing total
Always use the entered distribution
Always calculate disregarding impacts and distribution
Cancel
Help
Back
Next
Choosing some settings in this section will disable others.
Click "Next to open Step 2 of this wizard.
New Overlay
Step 2 of 2
Select activities
SiteZ - Month
AS activity
free activity
skill2 activity
WS activity
Choose one or more activities and then, click "Create'.
Cancel
Help
Back
Create

Creating an overlay

1. In the **Forecast** > **Overlays** view, select a business unit or site.
2. In the toolbar, click **New overlay**.
   The New Overlay dialog opens.
3. In the **Overlay name** field, enter a name for the overlay (limited to 127 characters).
4. Choose the statistic for this overlay: **IV** or **AHT**.
5. In the **Spread over** field, enter a value, specifying either **Days**, **Hours**, or **15 Minutes**.
   Valid values are between 1 (default) and 999.
6. Next, choose one of the following settings (choosing some settings in this section, will disable others):
   - Select **Impact Forecast values and totals** (default), if you want this overlay to change the forecast's values and totals. Then, choose one of the following:
     - **Always use the entered distribution**
     - **Always calculate disregarding impacts and distribution**
   - Select **Redistribute Forecast without changing total**, if you want this overlay to preserve the forecast's totals for a specific period, while changing the distribution of values inside that period. Then, choose one of the following:
     - **Always use the entered distribution**
     - **Always calculate disregarding impacts and distribution**

If you choose **Impact Forecast values and totals** and then, **Always use the entered distribution** in step 6, enter values for Initial impact and Ending impact. Click **Next**.

Wizard step 2

1. In the **Select activities** dialog, expand the business units or sites to select activities and/or multi-site activities for this overlay.
2. Click **Create**.
3. Click **OK** in the confirmation dialog.

You can click **Cancel** at any time to discard the settings and close the **New Overlay** wizard. Clicking **Cancel** in the progress dialog, causes WFM to close the dialog and refresh the grid.

Rules for initial and ending impact

Keep the following information in mind when entering values for initial and ending impact in the procedure Creating overlays:

- The **Initial impact** and **Ending impact** fields accept values from `-100` to `9999`.
- If you do not enter a value for both initial and ending impact, WFM creates 0.00 values in the Distribution grid.
- If you enter a value in only one of the impact fields and the spread over value is 1, WFM creates the distribution with the specified value.

- If you enter a value in only one of the impact fields and the spread over value is greater than 1, a validation message appears.
- If you enter different values in the impact fields and spread over is 1, a validation message appears.
- If you enter the values in both impact fields and spread over is 2, WFM creates the distribution with the specified values.
- If you enter the values in both impact fields and spread over is greater than 2, WFM creates the distribution by specifying the impact field values for the first and last timestep and calculates the remaining timesteps values by using a formula.

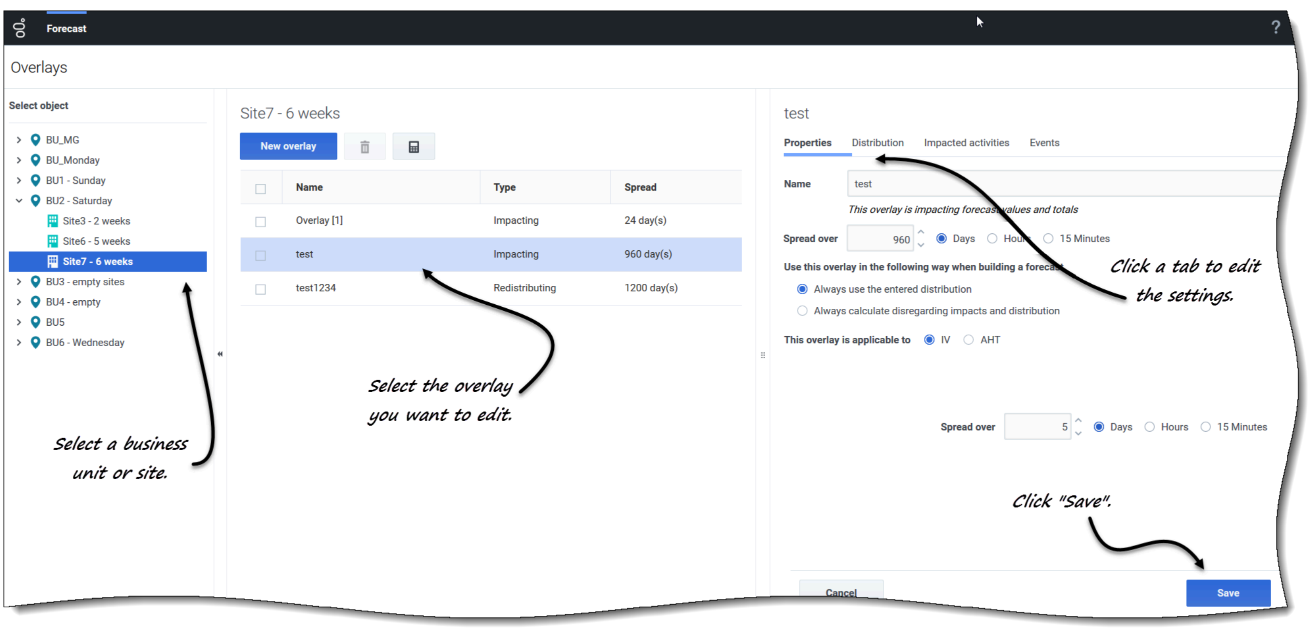
Editing overlays

In the Overlay Distribution grid, you can move from cell to cell by using the Enter or Shift+Enter keys on the keyboard.

Click a cell in the grid and on the keyboard, press:

- Enter to move the focus to the cell below the one selected.
- Shift+Enter to move the focus to the cell above the one selected.

If you select a cell in the **Average** or **Total** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.



Editing an overlay

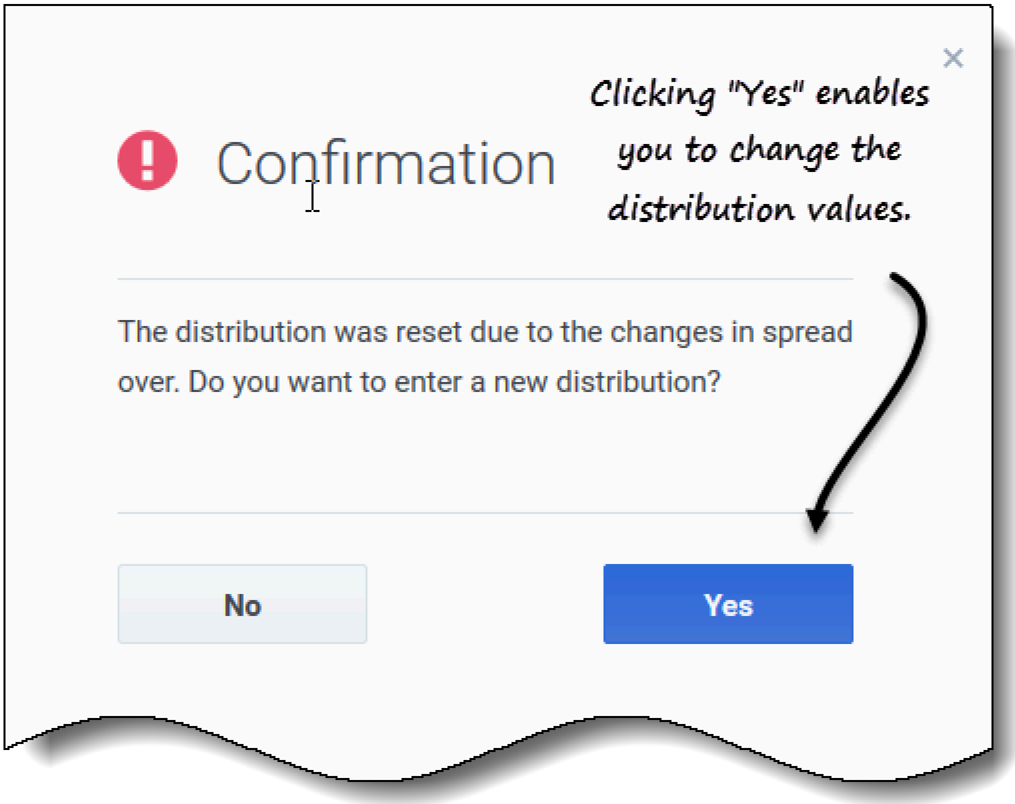
1. In the **Forecast** > **Overlays** view, select a business unit or site.
   The overlays for this object are displayed in a table.
2. In the **Overlays** table, select the overlay you want to edit.
   The Data pane opens, displaying four tabs.
3. Click a tab to change its settings.
4. Edit one or more of the tabs and click **Save**.
   Alternatively, click Cancel at any time to discard any changes you've made.

> Tip
>
> When editing values in the overlay's **Distribution** tab, you can copy and paste data from an Excel sheet by using Ctrl+C and Ctrl+V. See Selecting data to copy and paste.

Editing the Spread over value in the Properties tab

If you change the **Spread over** value in the Properties tab WFM enables you to update the distribution values directly.

After verifying the change to **Spread over** and clicking **Save**, you'll see the following message in the **Confirmation** dialog: *The distribution was reset due to the changes in spread over. Do you want to enter a new distribution?*

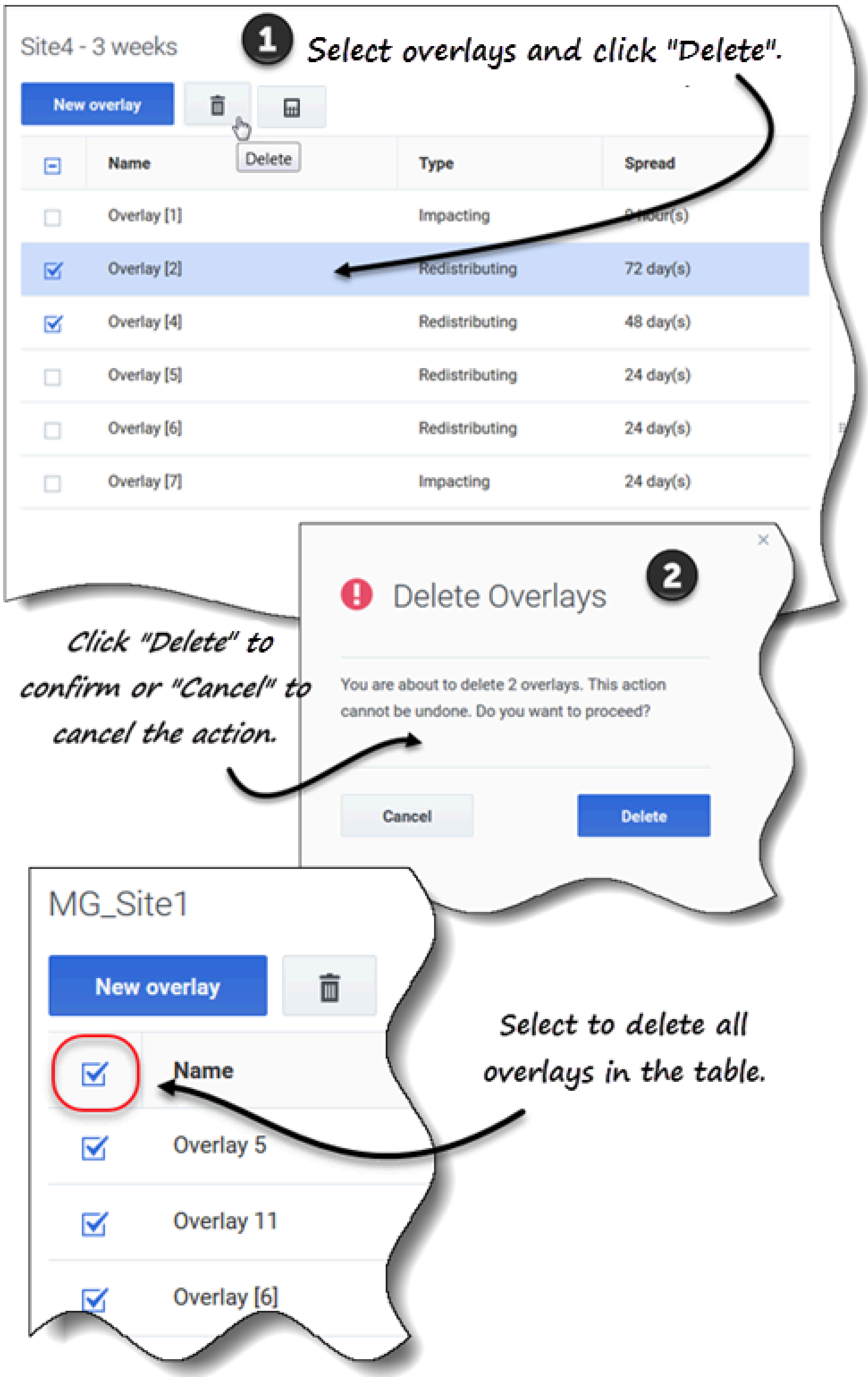


Changing the distribution

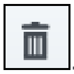
1. Click **Yes**.
   The distribution tab opens enabling you to proceed.
2. When you are finished making changes, click **Save**.
   WFM verifies that the new spread over and distribution values were successfully saved.

If you do not want to change the distribution, click **No**. The **Confirmation** dialog closes and WFM saves the new spread over value.

Deleting overlays


Site4 - 3 weeks
1
Select overlays and click "Delete".
New overlay
Delete
Name
Type
Spread
Overlay [1]
Impacting
Overlay [2]
Redistributing
72 day(s)
Overlay [4]
Redistributing
48 day(s)
Overlay [5]
Redistributing
24 day(s)
Overlay [6]
Redistributing
24 day(s)
Overlay [7]
Impacting
24 day(s)
Delete Overlays
2
You are about to delete 2 overlays. This action cannot be undone. Do you want to proceed?
Cancel
Delete
Click "Delete" to confirm or "Cancel" to cancel the action.
MG_Site1
New overlay
Name
Overlay 5
Overlay 11
Overlay [6]
Select to delete all overlays in the table.

Deleting an overlay

1. In the **Forecast** > **Overlays** view, select a business unit or site.
   The overlays for this object are displayed in a table.
2. In the table, select the overlay that you want to delete.
3. In the toolbar, click **Delete** .
4. When the confirmation dialog opens, click **Delete** to proceed or **Cancel** to cancel the action.

Deleting multiple overlays

1. Select the overlays you want to delete (using the check box beside each overlay).
2. Complete steps 3 and 4 in Deleting an overlay.

Deleting all overlays in the table

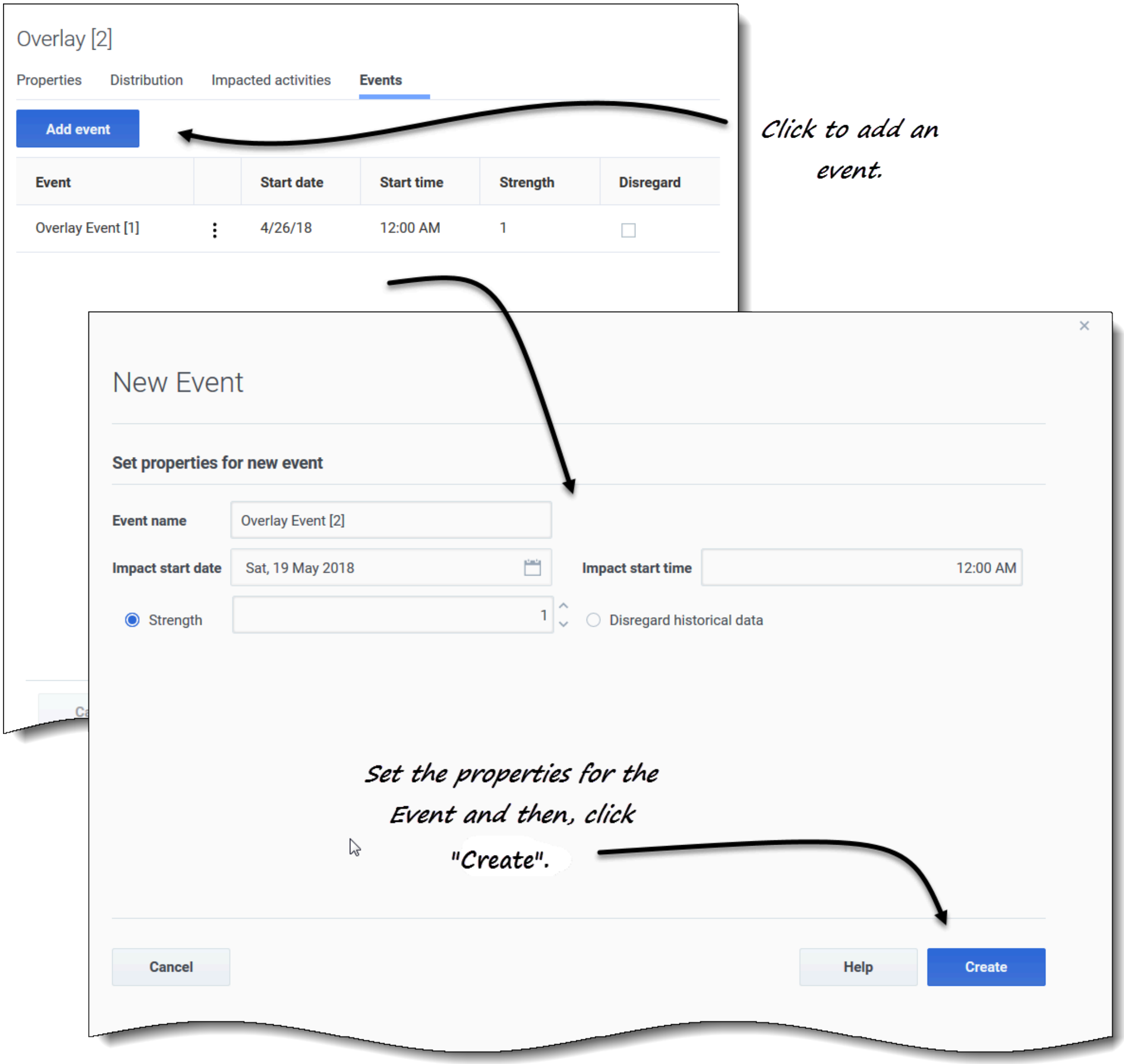
1. Select the top-most check box in the column header (near the **Name** column header).
2. Complete steps 3 and 4 in Deleting an overlay.

If you are deleting a single overlay, the confirmation dialog contains the overlay name. If you are deleting multiple overlays, the confirmation dialog states the number of overlays being deleted.

Adding overlay events

Use the selected overlay's **Events** tab to add and manage overlays events.

> **Tip**
>
> There are three types of events. For a description of each, see Understanding event types.

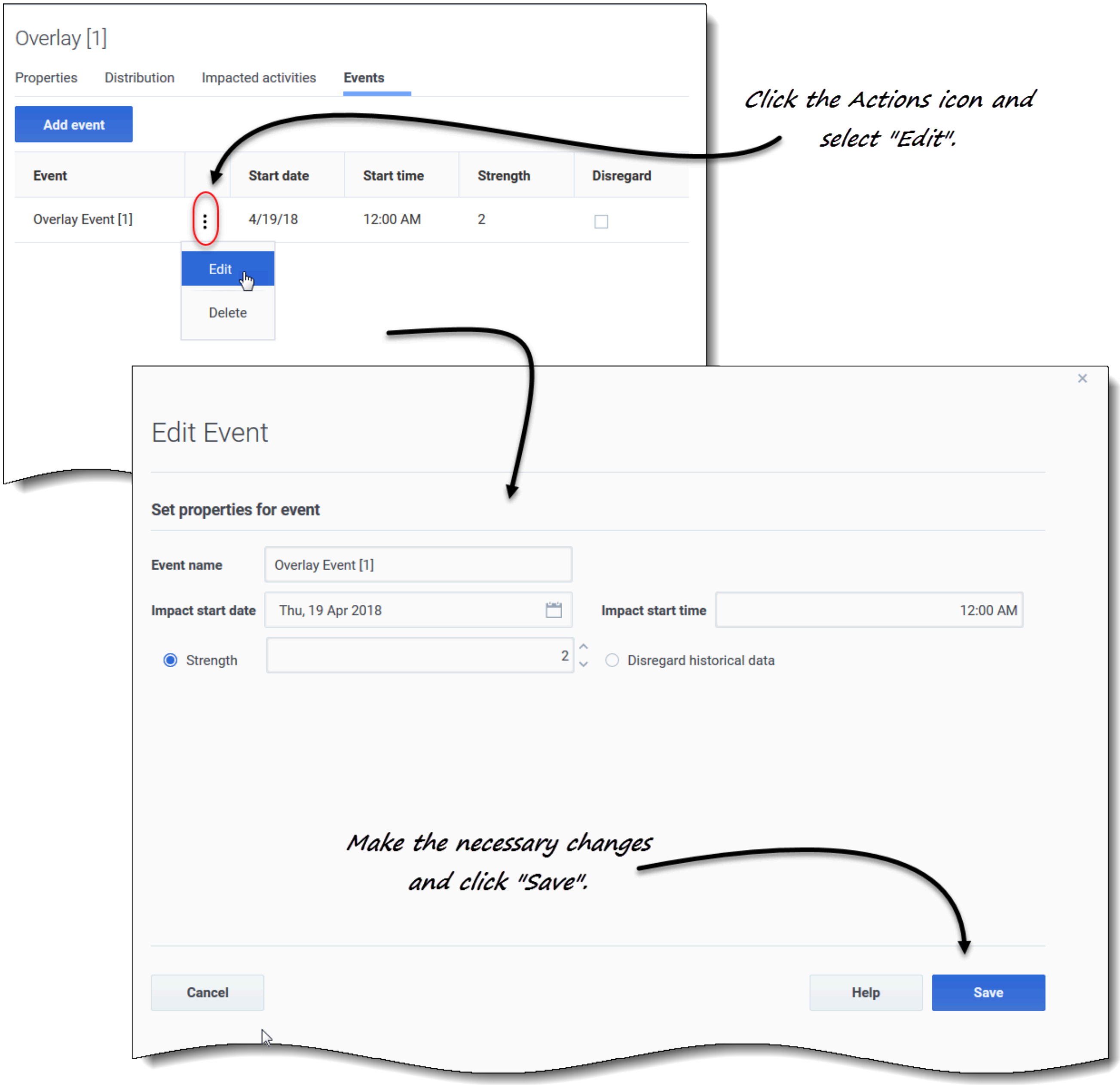


Adding an overlay event

1. In the **Forecast** > **Overlays** view, select a business unit or site.
   The overlays for this object are displayed in a table.
2. In the **Overlays** table, select an overlay.
3. In the **Data** pane, click the **Events** tab.
4. Click **Add event**.
   The New Event dialog opens.
5. In the **Event name** field, enter a name for the event.

6. In the **Impact start date** and **Impact start time** fields, enter the date and time, or keep the default date and time.
7. In the **Strength** field, you can enter a value or keep the default. The range is `0` to `999999999.99`.
8. Alternatively, you can disable the value in the **Strength** field by selecting **Disregard historical data**. **If Disregard historical data is *not* selected, WFM considers historical data when processing events.**
9. Click **Create**.
10. When the confirmation dialog opens, click **OK**. **Alternatively, click Cancel at any time to cancel the action.**

Editing events

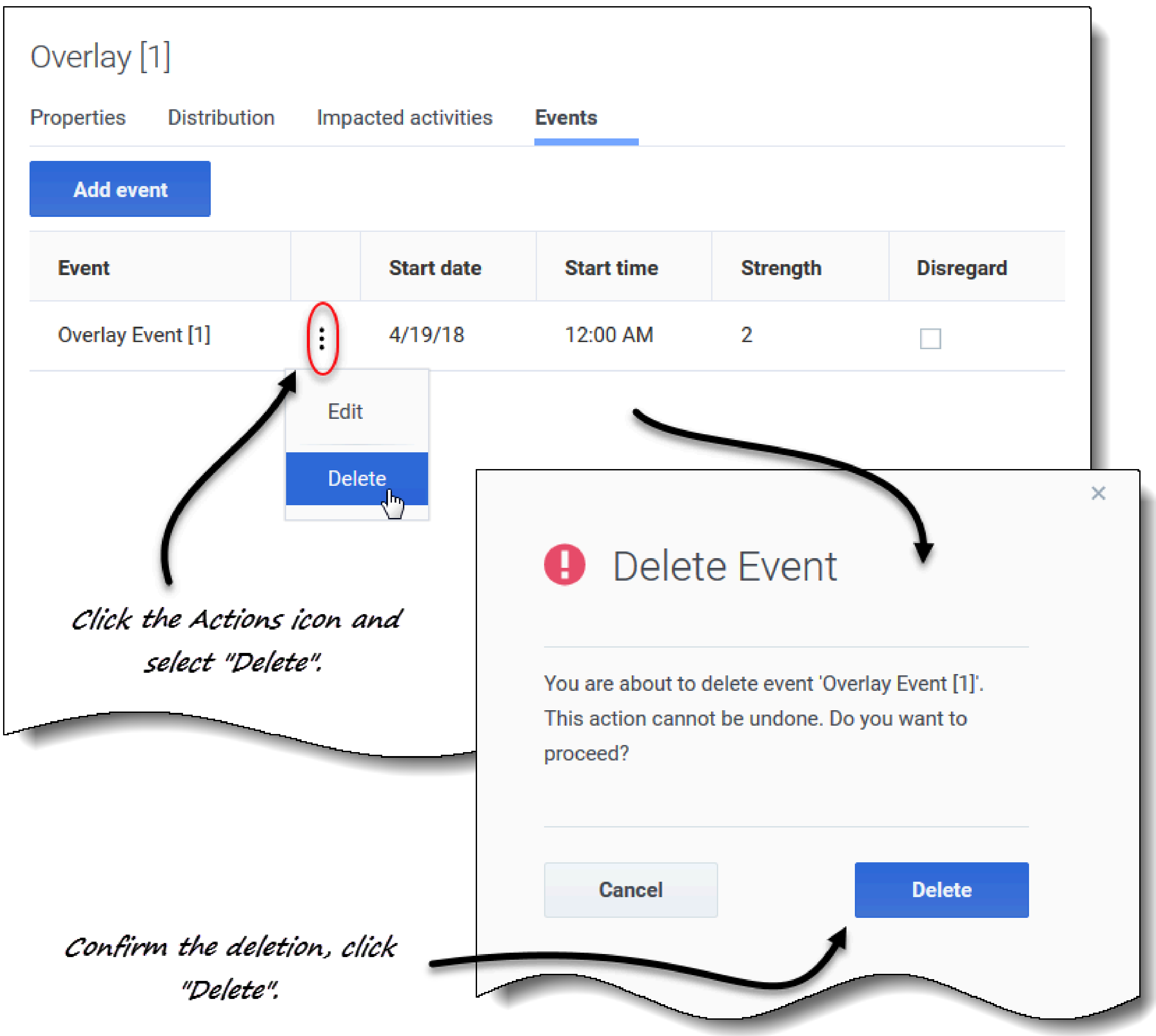


Editing an overlay event

1. In the **Forecast** > **Overlays** view, select a business unit or site.
   The overlays for this object are displayed in a table.
2. In the **Overlays** table, select an overlay.
3. In the **Data** pane, click the **Events** tab.

4. In the row of the event you want to edit, click **Actions** and select **Edit**.
   The Edit Event dialog opens.
5. Make the necessary changes and then, click **Save**.
6. When the confirmation dialog opens, click **OK**.
   Alternatively, click Cancel at any time, if you want to cancel the action and discard the changes.

Deleting events

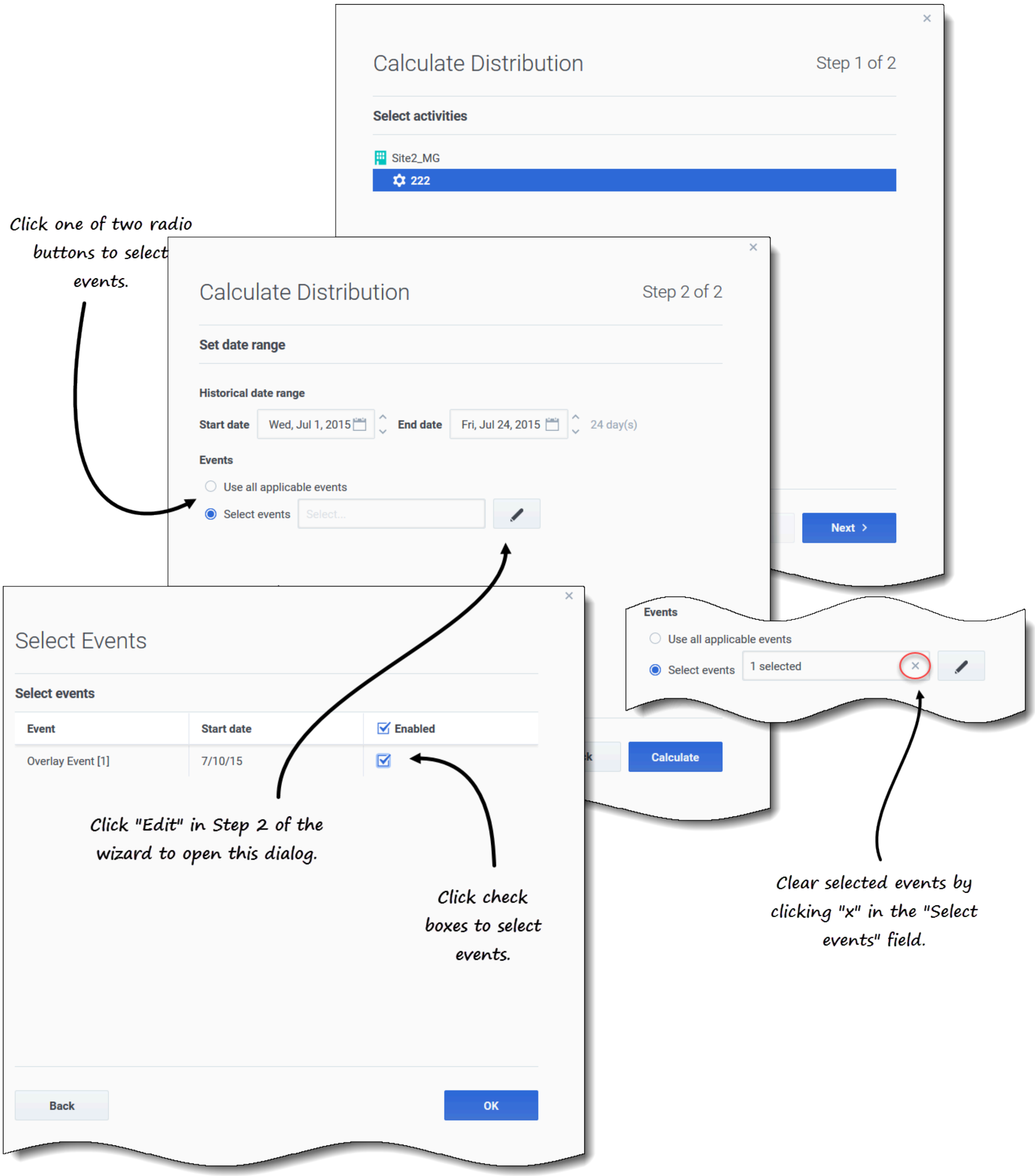


Deleting an overlay event

1. In the **Forecast** > **Overlays** view, select a business unit or site.
   The overlays for this object are displayed in a table.
2. In the table, select an overlay.
3. In the **Data** pane, click the **Events** tab.
4. In the row of the event you want to edit, click **Actions** and select **Delete**.
5. When the **Delete Event** confirmation dialog opens, click **Delete** to proceed or **Cancel** to cancel the action.

Calculating distribution in overlays

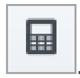
This procedure describes how to use the wizard to calculate an overlay's distribution. The wizard icon is enabled only if **Always use the entered distribution** is selected in the overlay's properties. See Creating overlays.



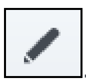
Calculating an overlay's distribution using the wizard

1. In the **Forecast** > **Overlays** view, select a business unit or site.

The overlays for this object are displayed in a table.

2. In the **Overlays** table, select an overlay (that has **Always use the entered distribution** selected).
3. Click **Calculate Distribution** .
   The wizard open at Step 1.
4. Select an activity or multi-site activity and then, click **Next**.
   Step 2 of the wizard opens.

Wizard step 2

1. Enter the **Start** and **End date** for the historical date range (use the up/down arrows or click the calendar to select a date).
   By default, WFM displays the start and end date of the historical date range for the selected activity.
2. To select events, choose one of two radio buttons:
   - **Use all applicable events**—Do nothing if you want all events to be considered when distribution is calculated. This button is selected by default.
   - **Select events**—Click this button if you want to select specific events.
     1. Click **Edit** .
        The Select Events dialog opens.
     2. Click the check box beside an event if it should be considered for calculations and then, click **OK**.
        Clicking the top-most check box selects all events in the list.

   The wizard returns to Step 2 and the Select events field shows the number of events you selected.
3. Click **Calculate**.
   When processing is complete, the Distribution tab shows the distribution for this overlay.

Click **Cancel** at any time in the wizard to cancel all actions and close the wizard dialog.

Selecting overlay events in the wizard

When selecting events in the **Calculate Distribution** wizard:

- If the selected activity does not have overlay events, you'll see the message *You do not have any overlay events*.
- The dialog displays only events that fall within the selected historical date range.
- You can clear the events you selected in the **Select Events** dialog, by clicking **x** in the **Select events** field when the wizard returns to Step 2.

Selecting data to copy and paste

> **Tip**
> If you are unable to copy/paste, ask your administrator to confirm that HTTPS secure connections to WFM are being used in your environment.

In the Overlays Distribution grid, WFM enables you to use key combinations on the keyboard to select data for copying and pasting. You can copy/paste within the grid and to/from a document (for example, Excel or NotePad).

Shift+arrow keys

Click a cell in the grid and press:

- Shift+up arrow key to select additional cells above the selected cell.
- Shift+down arrow key to select additional cells below the selected cell.
- Shift+right arrow key to select additional cells to the right of the selected cell.
- Shift+left arrow key to select additional cells to the left of the selected cell.

You must select the **Total/Average** row and the **Time step** column separately. They cannot be selected with other rows or columns in the grid.

Shift+Page Up, Shift+Page Down

Click a cell in the grid and press:

- Shift+Page Up to select all cells above the selected cell.
- Shift+Page Down to select all cells below the selected cell.

Ctrl+A

- Click any cell in the grid and press Ctrl+A—All cells in the grid are selected.
- Click any cell in the **Time step** column and press Ctrl+A—All cells in the column are selected.
- Click anywhere in the **Total/Average** row and press Ctrl+A—The entire row is selected.

Drag mouse or touch pad

- Click any cell in the grid and hold down the right mouse key while dragging the mouse right, left, up, down, or any combination of directions. The range of cells is selected.
- Click any cell in the **Time step** column and hold down the right mouse key while dragging the mouse up or down. The range of cells in the column is selected.
- Click anywhere in the **Total/Average** row and hold down the right mouse key while dragging the mouse left or right. The entire row is selected.

You must select the **Total/Average** row and the **Time step** column separately. They cannot be selected with other rows or columns in the grid.

Shift+ mouse-click

- Hold down the Shift key and click any cell in the grid. Using the mouse, click anywhere in the grid up or down. The range of cells is selected.
- Hold down the Shift key and click any cell in the **Time step** column. Using the mouse, click anywhere in the column, up or down. The range of cells is selected.
- Hold down the Shift key and click anywhere in the **Total/Average** row. Using the mouse, click anywhere in the column, right or left. The entire row is selected.

You must select the **Total/Average** row and the **Time step** column separately. They cannot be selected with other rows or columns in the grid.

Ctrl+C, Ctrl+V

Select cells in the grid, and press:

- Ctrl+C to copy values in the grid. The message *Copied to clipboard* appears. Click **X** to close it.
- Crtl+V to paste values in an Excel spreadsheet or a text editor such as, NotePad.

If more cells are copied than there are cells to paste into, WFM extends the number of cells/column/rows to accommodate the data being pasted.

Common forecasting tasks

Contents

Find out which common tasks can be completed in more than one Forecasting view.

Related documentation:

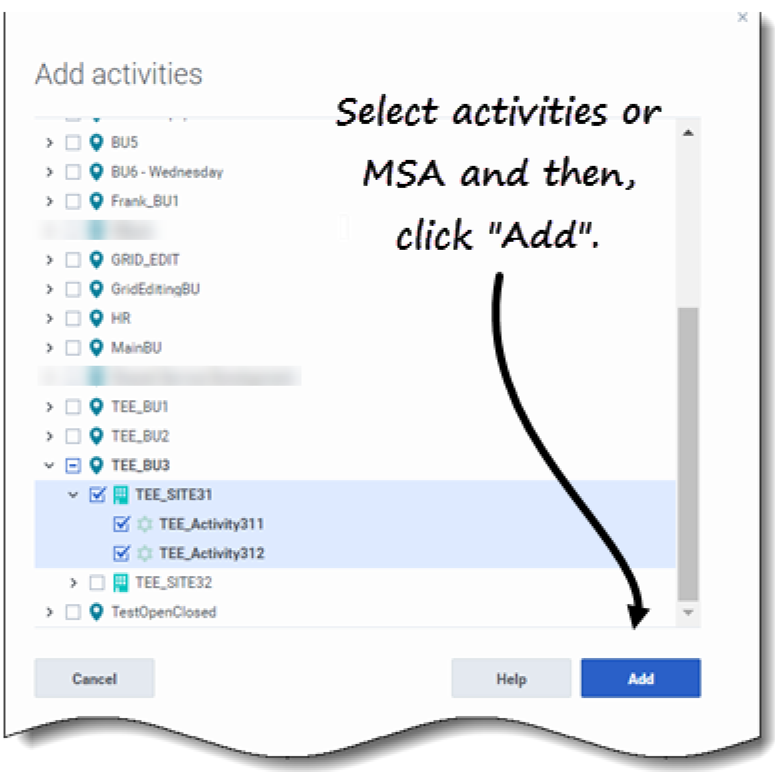
-

In some cases, Workforce Management (WFM) enables you to complete the same task in more than one Forecast view. In this topic, you'll find descriptions and procedures to help you complete these common tasks.

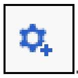
Adding and removing activities

Add or remove activities or multi-site activities (MSA) in open scenarios by using the **Add activities** and **Remove activities** icons in the toolbar in all Scenarios views (Volumes, Staffing, Shrinkage).

Adding activities or MSA

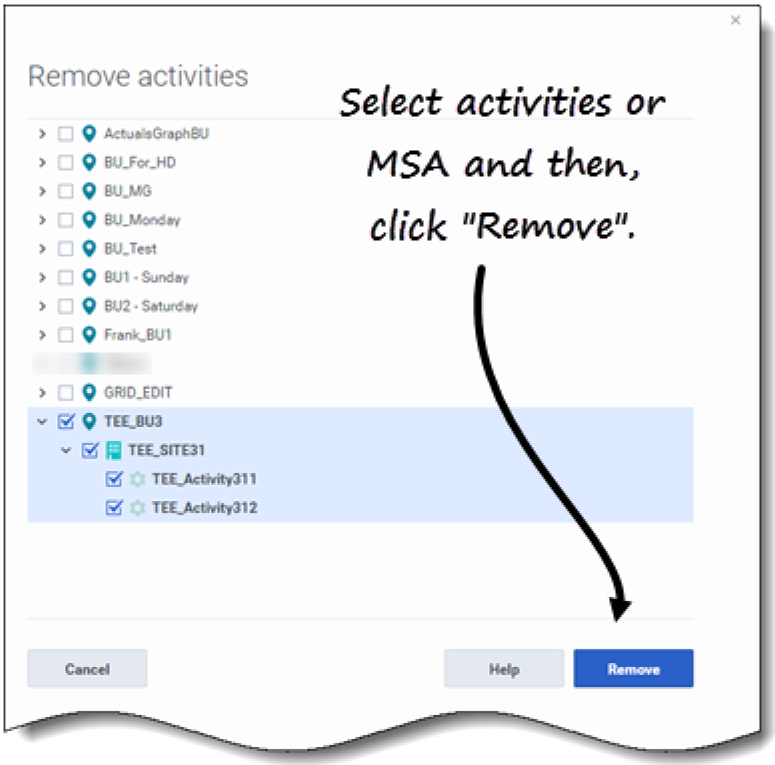


To add activities or MSA to an existing forecast:

1. Open a scenario.
2. In the toolbar, click **Add activities** .
   The Add activities dialog open.
3. Expand the tree to select the activities you want to add.
   You can select from multiple sites.
4. Click **Add**.
5. When processing is complete, click **OK**.

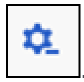
Click **Cancel** at any time to cancel the action and close the dialog.

Removing activities or MSA



To remove activities or MSA from an existing forecast:

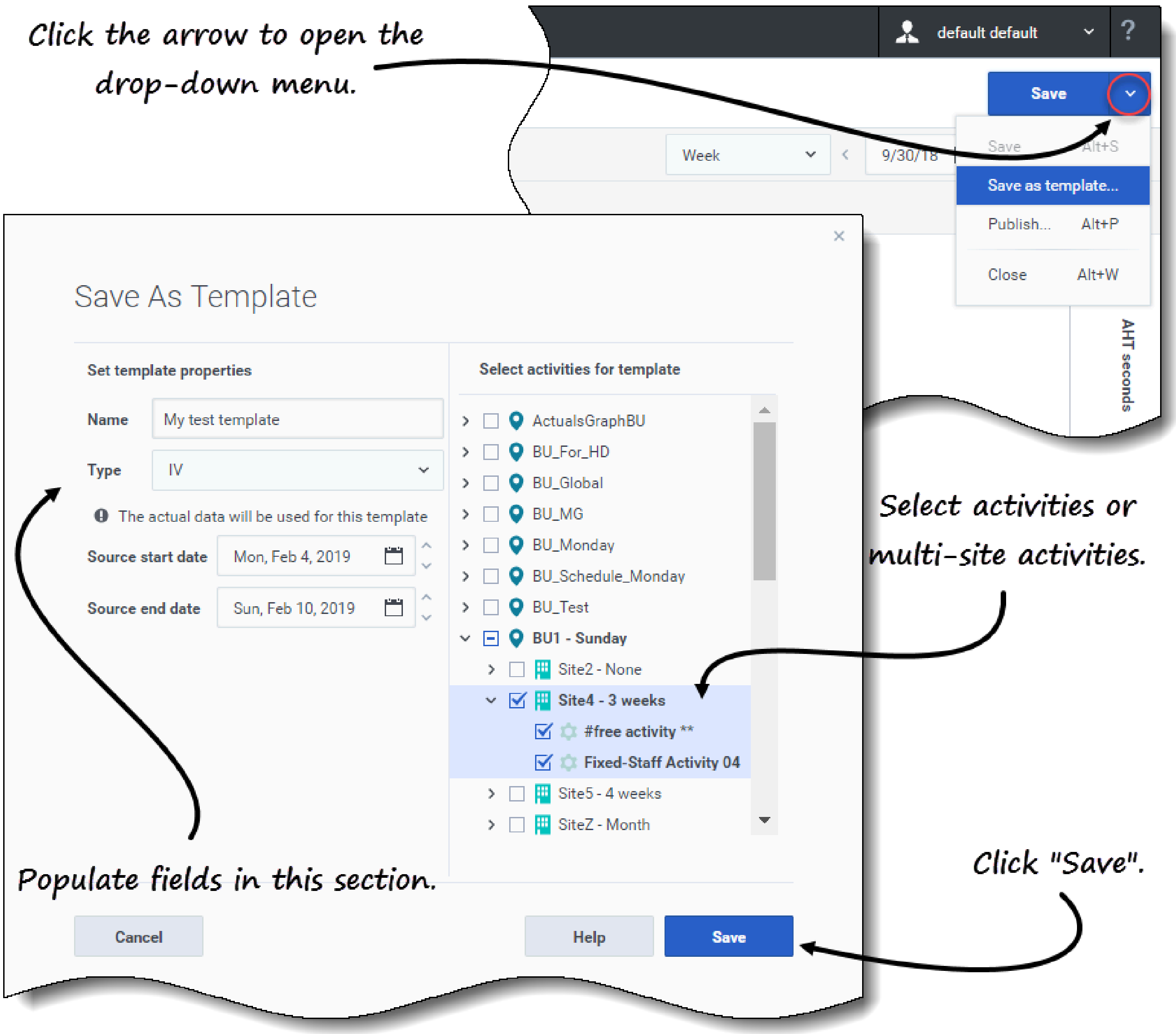
1. Open a scenario.

2. In the toolbar, click **Remove activities** .
   The Remove activities dialog open.
3. Expand the tree to select the activities you want to remove.
   You can select from multiple sites.
4. Click **Remove**.
5. When processing is complete, click **OK**.

Click **Cancel** at any time to cancel the action and close the dialog.

Saving forecasts as templates

Reuse data in an existing scenario or Master Forecast by using the **Save as Template** wizard to create a forecast template. You can use this wizard in all Scenarios and Master Forecast views.



To save the forecast as a template:

1. Open a scenario or Master Forecast.
2. In the **Objects** pane, select an activity or multi-site activity (MSA).
   This enables the Save as template option.
3. In the top-right corner of the view, click the down arrow on the **Save** button.
4. When the drop-down menu opens, select **Save as template...**.
   The Save As Template dialog opens.
5. In the **Name** field, enter a name for the new template.
6. Select the template type from the **Type** drop-down list (**IV** or **AHT** if opened in the **Volumes** view).
   This field has a populated value that cannot be changed when you open this dialog in the

Staffing or Shrinkage view.

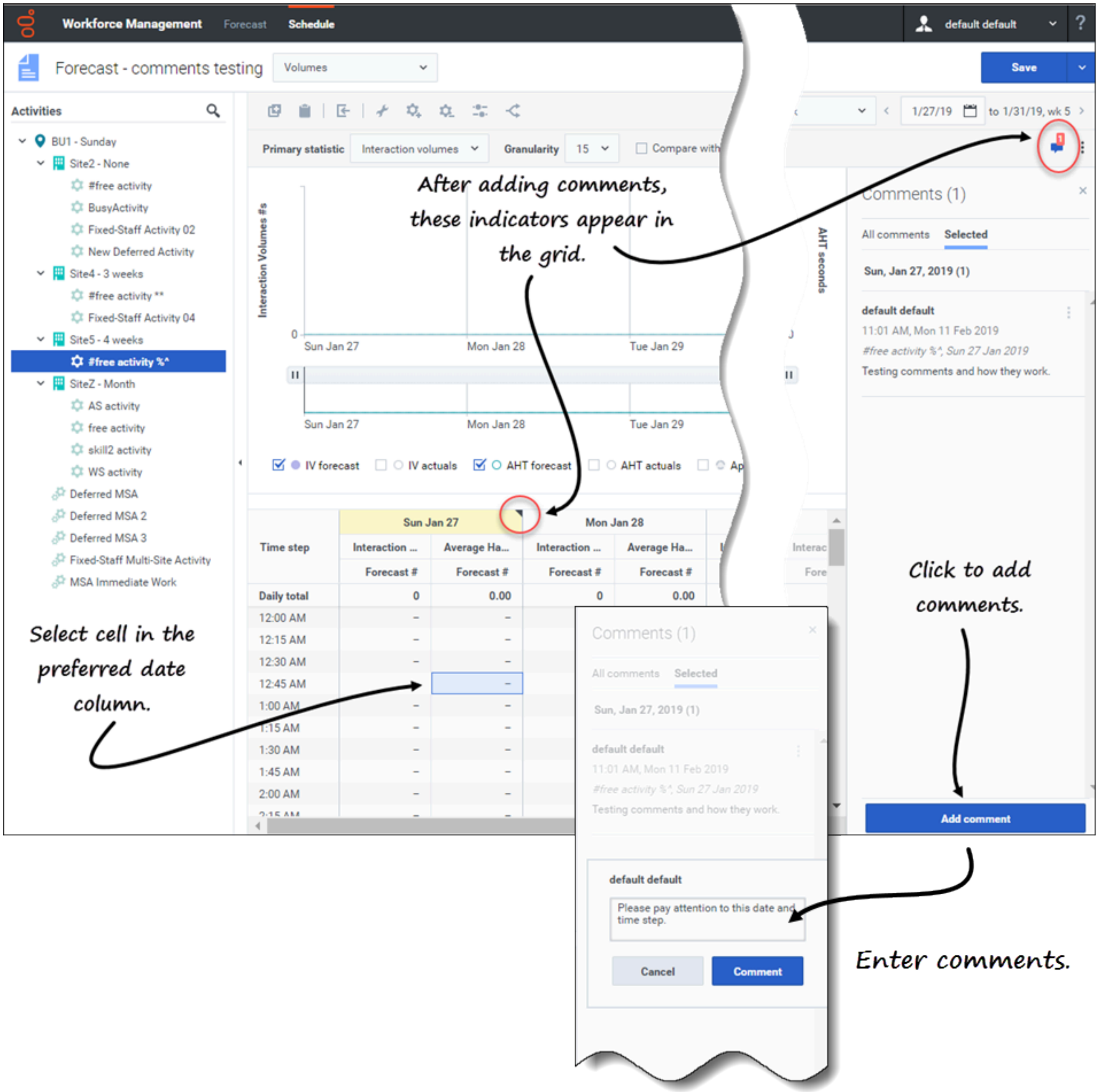
7. Select or enter the **Source start date** and **Source end date** into the corresponding fields.
8. Expand the list of objects on the right to select activities or multi-site activities to use for this template and click **Save**.
9. When the saving process is complete, click **OK**.
   The new forecast template appears in the Templates view.
10. Alternatively, click **Cancel** to cancel the action and close the dialog.

Commenting in forecasts

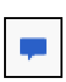
Add, open, edit, delete, and sort comments in scenarios or Master Forecasts by using the **Comments** dialog. You can open this dialog in all Scenarios and Master Forecast views. Watch the video.

> Tip
>
> Comments added in the Web for Supervisors (Classic) Forecast module are visible in this Forecast module. However, comments added in this Forecast module are not visible in the (Classic) Forecast module.

Adding and opening comments



To add comments to a forecast:

1. Open a scenario or Master Forecast view.
2. In the **Objects** pane, expand the tree and select an activity or multi-site activity.
3. In the grid, select a cell in the date column where you want to add comments.
4. Click **Comments**  in the upper-right corner of the view.

The Comments pane opens.

5. Click **Add comment**.
6. Enter your comment in text field (2000 characters, maximum) and click **Comment**.
The comment displays on the Selected tab.

After adding comments for a specified date:

- If the selected period is weekly, the column header in the grid displays in yellow. A triangle in the upper-right corner indicates that there are comments for that date.
- If the selected period is monthly or yearly, the cells in the row for that date appear in yellow with the triangle in the upper-right corner.
- In the upper-right corner of the view, the **Comments** icon shows the total number of comments in red for the selected activity or multi-site activity.

Link to video

Open the **Comments** pane in one of two ways:

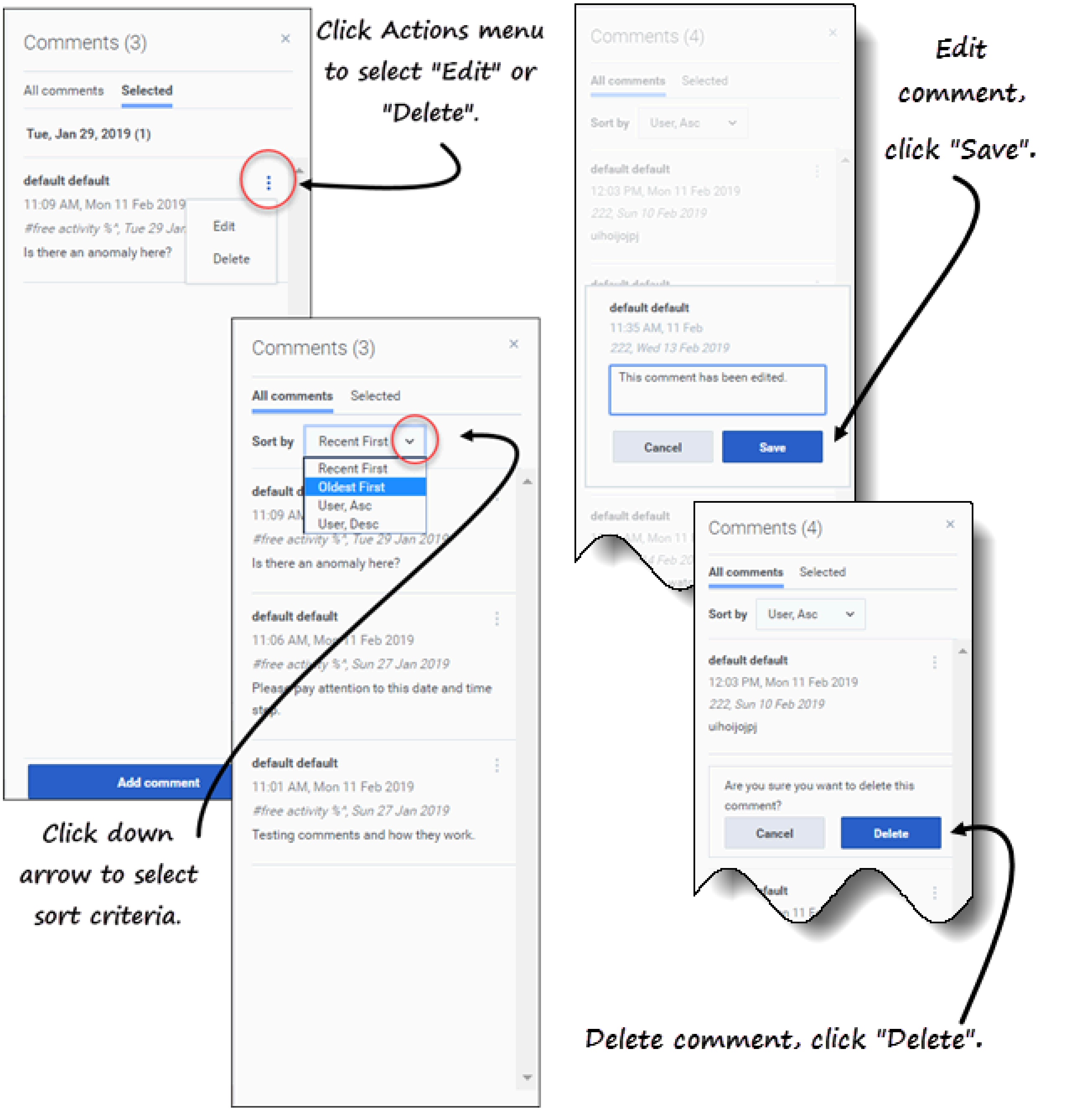
1. Click the triangle in the date cell.
   The Selected tab opens, by default.
2. Select an activity and then, click **Comments** in the upper-right corner of the view.
   The All comments tab opens, by default. If there are no comments for the selected activity, the *No comments* message displays.

If you select a range of date cells, the **Selected** tab opens displaying the comments for the first selected date. If you select a date cell that has no comments, the **Selected** tab opens displaying *No comments*.

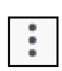
If there are more than 3 lines of text, click **More** to see the entire comment. Click **Less** to hide it.

Close the **Comments** pane by clicking the **X** in the upper right corner of the pane.

Editing, deleting, and sorting comments



To edit comments:

1. Open the **Comments** pane.
2. In the comment you want to edit, click **Actions**  to open the drop-down menu.
3. Select **Edit**.
4. When the text box opens, edit the comment.

5. Click **Save**.

You can edit only the comments you created. If you click a comment created by someone else, **Delete** is the only option displayed in the **Actions** menu.

To delete comments:

1. Open the **Comments** pane.
2. In the comment you want to delete, click **Actions** to open the drop-down menu.
3. Select **Delete**.
4. When asked to confirm the deletion, click **Delete**

To sort comments:

1. Open the **Comments** pane.
2. Select the tab you want to sort.
3. In the **Sort by** field, click the down arrow to open the menu.
4. Select one of four sort criteria: **Recent First**, **Oldest First**, **User, Asc**, or **User, Desc**.
   The list of comments sorts according to the selected criteria.

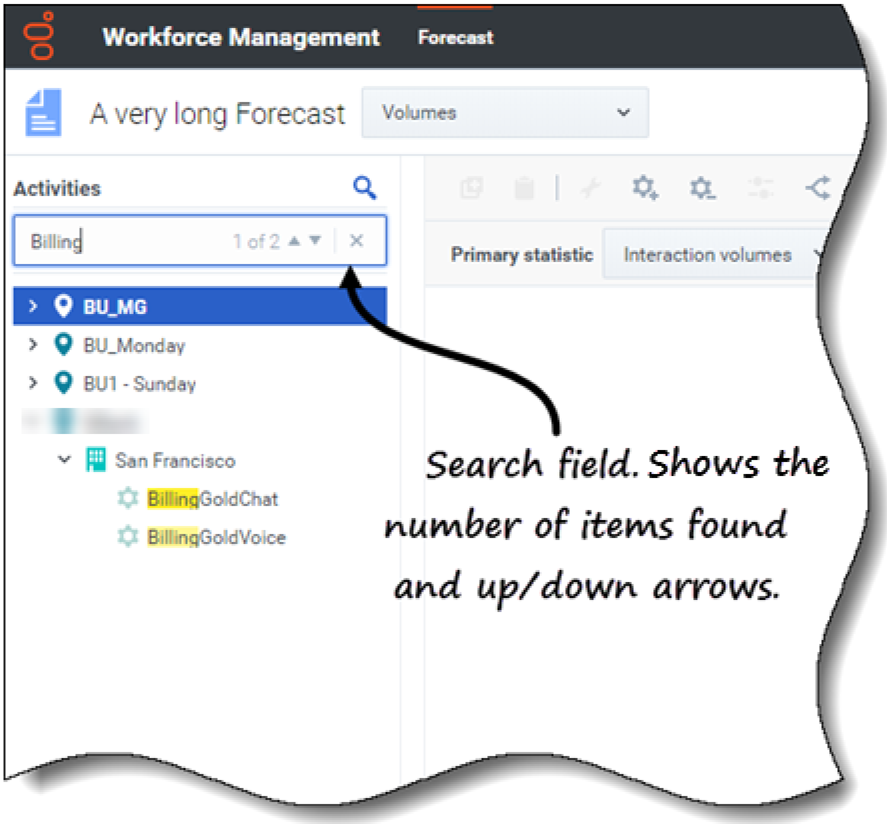
The **Sort by** field is visible only if there are two or more comments in the tab. Selecting **User, Asc** or **User, Desc** sorts comments by the user's name in ascending or descending order. **Recent First** is the default sort order.

Click **Cancel** at any time to cancel the action when adding, editing, and deleting comments.

Using Search to find objects

Find activities quickly in Scenarios and Master Forecast views by using Search in the Objects pane.

Click the icon at the top of the Objects pane to show or hide the Search field. You can use this search function in all Scenarios and Master Forecast views.



To use search to find objects quickly:

1. Open any one of the Scenarios or Master Forecast views.
2. If you are in the **Scenarios** view, click the **Actions** menu and open a scenario.
3. In the **Objects** pane, click **Search** .
   The Search field is displayed.
4. Enter the search criteria. For example, the name of an object (business unit, site, activity, multi-site activity).
   WFM highlights any matching text as you type.
5. Click **Enter**.
   WFM expands the list to show the number of matching objects found and shows the number of matching items in the Search field, together with up/down arrows.
6. Click the up or down arrow until you find the object you're searching for.
7. Click **x** to clear the **Search** field and start a new search.

If WFM does not find matches for the search criteria you've entered, WFM displays **0 of 0** found and no text is highlighted in the list of objects.

Master Forecasts

Contents

Learn how to use the settings and understand and manage the data, and find events in the Master Forecast views.

Related documentation:

-

Tip

This page describes the latest Workforce Management (WFM) Forecast interface. If are using the Supervisor (Classic) interface and have landed on this page by accident, see the *Workforce Management Web for Supervisors (Classic) Help*, which describes all modules, including the classic Forecast module.

WFM Master Forecast consists of the volumes and staffing data that is built on forecast scenarios that have been published. Here's what you'll find in these views:

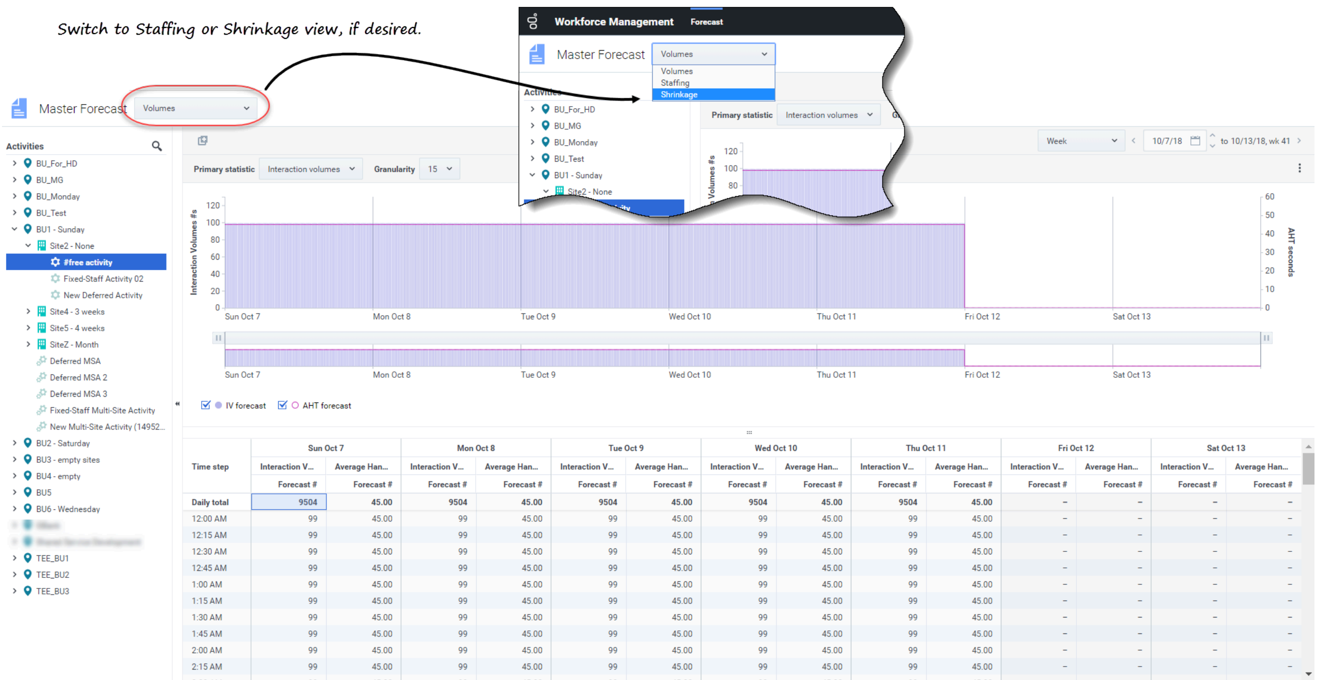
- **Master Forecast** > Volumes—Interaction volumes (IV) and average handle time (AHT) data.
- **Master Forecast** > Staffing—Calculated and required staffing data.
- **Master Forecast** > Shrinkage—Overhead data, which WFM uses to forecast shrinkage while scheduling.

Note that the **Forecast** > Scenarios view also has **Volumes**, **Staffing** and **Shrinkage** views. These views are similar, but in some ways different from the Master Forecast views. For example, you might create several forecast scenarios containing volumes, staffing, and shrinkage data before choosing one that is optimal for publishing to the Master Forecast.

Viewing the volumes data

Use the Forecast Volumes view in the Master Forecast to display the interaction volumes (IV) and average handle time (AHT) data. When you select an object in this view, the start date is determined by the selected business unit's week start day setting, regardless of your locale settings.

This view provides standard date-selectors and a grid that shows statistics for days or timesteps.



Opening the Volumes view in the Master Forecast

1. In the navigation bar, select **Forecast** > **Volumes**.
2. In the **Objects** tree, expand a business unit to select a site, activity, or multi-site activity.

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

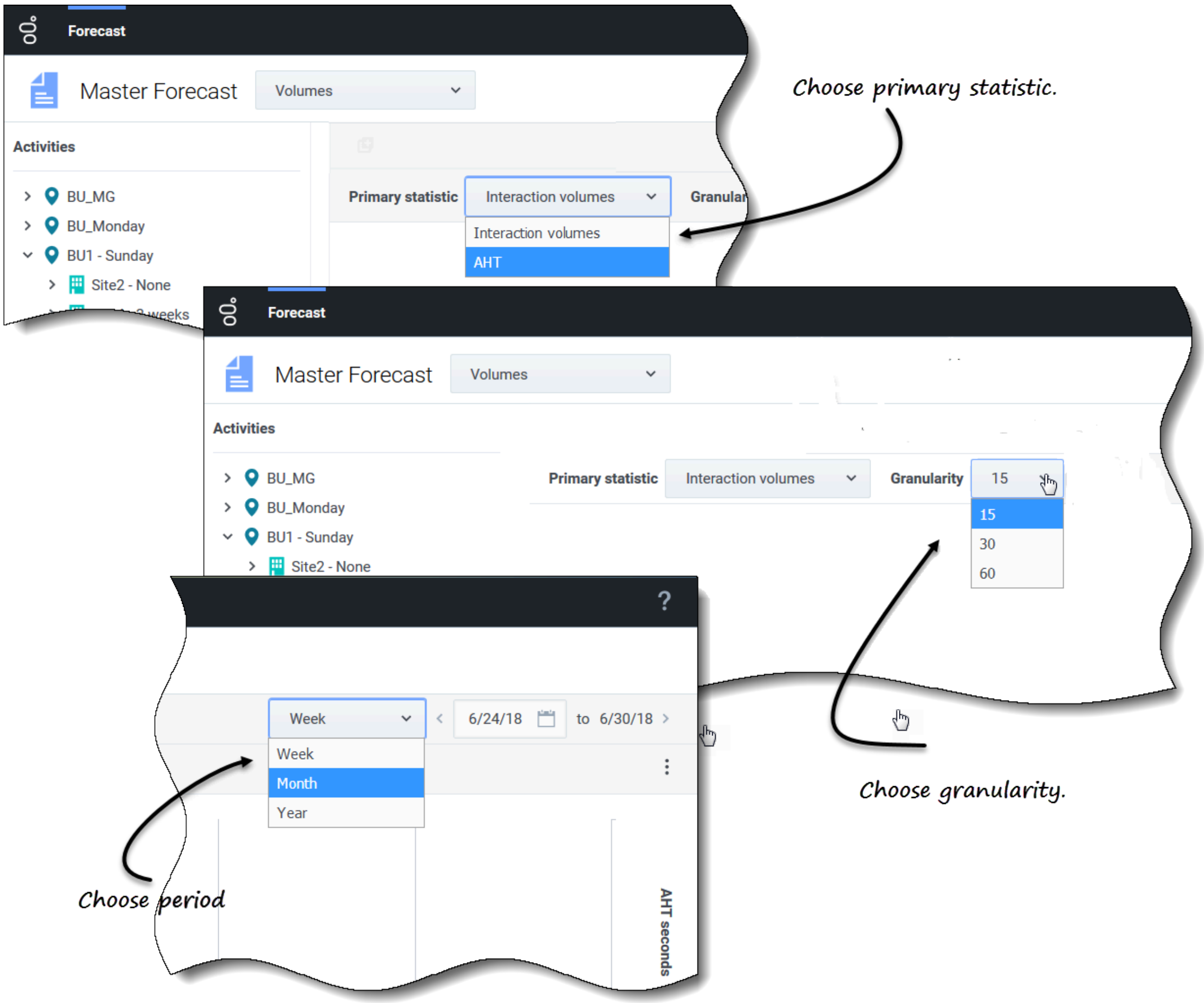
If you do not see any volumes data, you can adjust the Period drop-down list, the sliders (below the graph), or the Granularity and date-selectors at the top of the window to reflect those used for the forecast.

The grid displays open hours for selected site activities and multi-site activities in the same way.

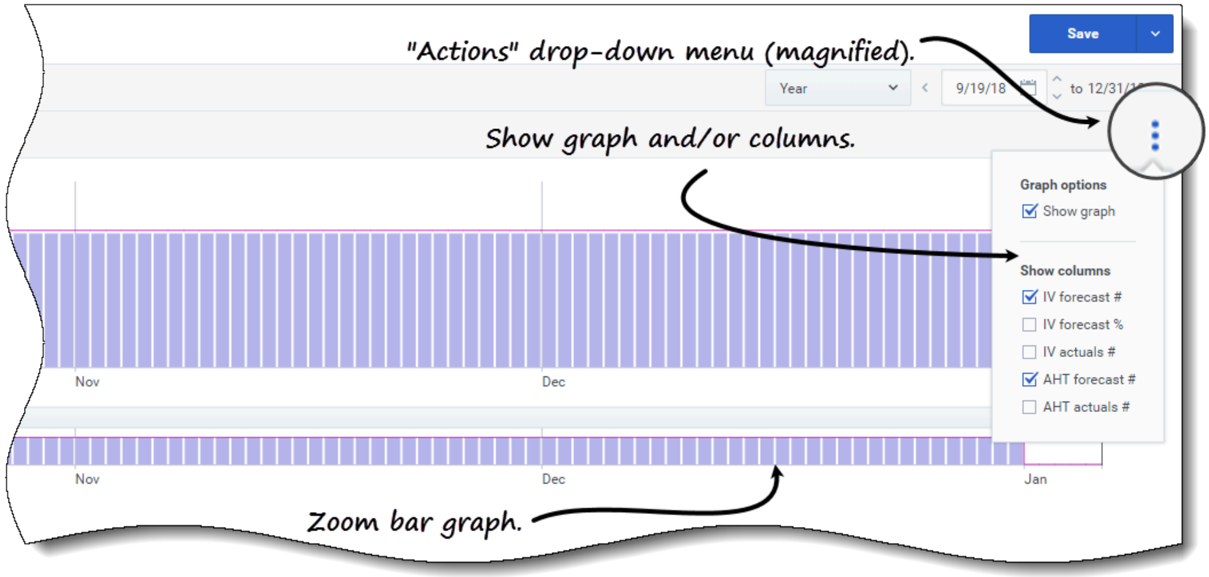
You can view the staffing or shrinkage data in the Master Forecast, by selecting Staffing or Shrinkage from the drop-down list in the top-left corner of this view.

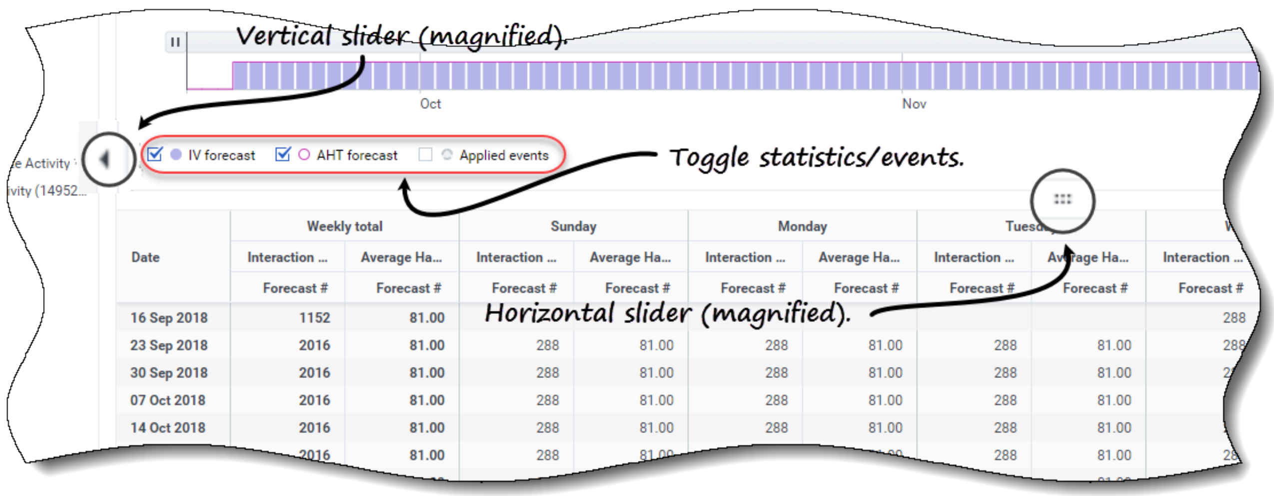
Setting the data display properties

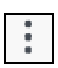
In this view, use the following controls to customize the data display:



- **Primary statistic** *drop-down list*—Select the statistic that will be displayed as primary, by selecting **Interaction Volume** (IV) or **AHT** (average handle time). The primary statistic displays as a bar in the graph and the secondary statistic displays as a red line.
- **Granularity** *drop-down list*—Select **Month** or **Year** to adjust the granularity to **Day**. Select **Week** to further adjust each row's time range by selecting **15**, **30**, or **60** (minutes) from this list.
- **Period** *drop-down list*—Change the time range for the graph and grid by selecting **Year**, **Month**, or **Week**. If the selected site has a configured planning period, you can also select **Planning Period**.
- **Date range**—Use the date-selectors (top-right portion of the view) to switch to a different period within the scenario forecast's date range. The week number is also displayed here when the selected period is **Week**.





-  **Actions** *drop-down menu*—Click this icon to change the graph and/or table:
  - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also Sliders.
  - **Show columns**—Show/hide data columns in the table by selecting/clearing the following check boxes:
    - **IV forecast #**
    - **IV forecast %**
    - **IV actuals #**
    - **AHT forecast #**
    - **AHT actuals #**

Click anywhere in the view to close the drop-down menu.

- **Toggle statistics/events** *check boxes*—Below the graph, toggle a statistic or applied events on or off. Selecting the check box or clicking the radio button toggles it on, displaying the primary statistic as bars, the secondary statistic as a red line, and applied events as a striped orange line. Clearing the check box or clicking the radio button toggles it off, making the statistic or event invisible in the graph. When turned on, the primary statistic's radio button is light blue and the **Applied events** button is yellow.

> Tip
>
> *Applied events* are events that have been added to Overlays and the striped orange line represents the start of the event's impact for that period.

Watch the video demonstrating how following features (described here and shown in the graphics above) work. The Smooth graph feature described in the first half of the video is not available In the Master Forecast views:

Link to video

- **Sliders**—Drag the vertical slider left/right to show/hide the graph, zoom bar, grid and/or **Objects** pane. Click the arrows in the vertical slider to resize the **Objects** pane. Drag the horizontal slider up and down to show/hide the graph or grid.
- **Zoom bar graph**—Use the zoom bar handles to narrow/widen the focus in the graph, by sliding the handle left/right. You can zoom to a minimum of one day. After narrowing the focus, place your cursor over the graph and change the range of the zoom by dragging and dropping it to the left or right. For example, if you narrow the focus to Sunday, Monday, and Tuesday, but want to change it, drag and drop the zoom to the right to Tuesday, Wednesday, Thursday.

Reading the volumes data

The graph shows the statistics, dates, period, and granularity that you selected above. The vertical axis indicates the primary statistic on the left and the secondary statistic on the right. The horizontal axis indicates the different units for the two statistics.

To understand the volumes data, see Reading the data in the **Scenario** > **Volumes** topic.

Editing the volumes data

In the **Master Forecast** > **Volumes** grid, WFM enables you to edit values in the Actual columns only (**Actual IV** and **Actual AHT**). You can edit timesteps and daily totals when the selected period is **Week** and edit weekly and daily totals when the selected period is **Month** or **Year**.

You must have the Forecast access privilege **Edit Historical Data** to edit values in the Actual columns.

When changing the period, granularity, and/or values in the grid, note that daily totals are aggregated values for a 24-hour period. This means the daily and weekly totals automatically adjust and are redistributed according to the original distribution of volume for each day of the week or week of the month/year.

Find information about editing modes and see the editing procedure in Editing data in the grid in the **Scenarios** > **Volumes** topic.

Copying and pasting the volumes data

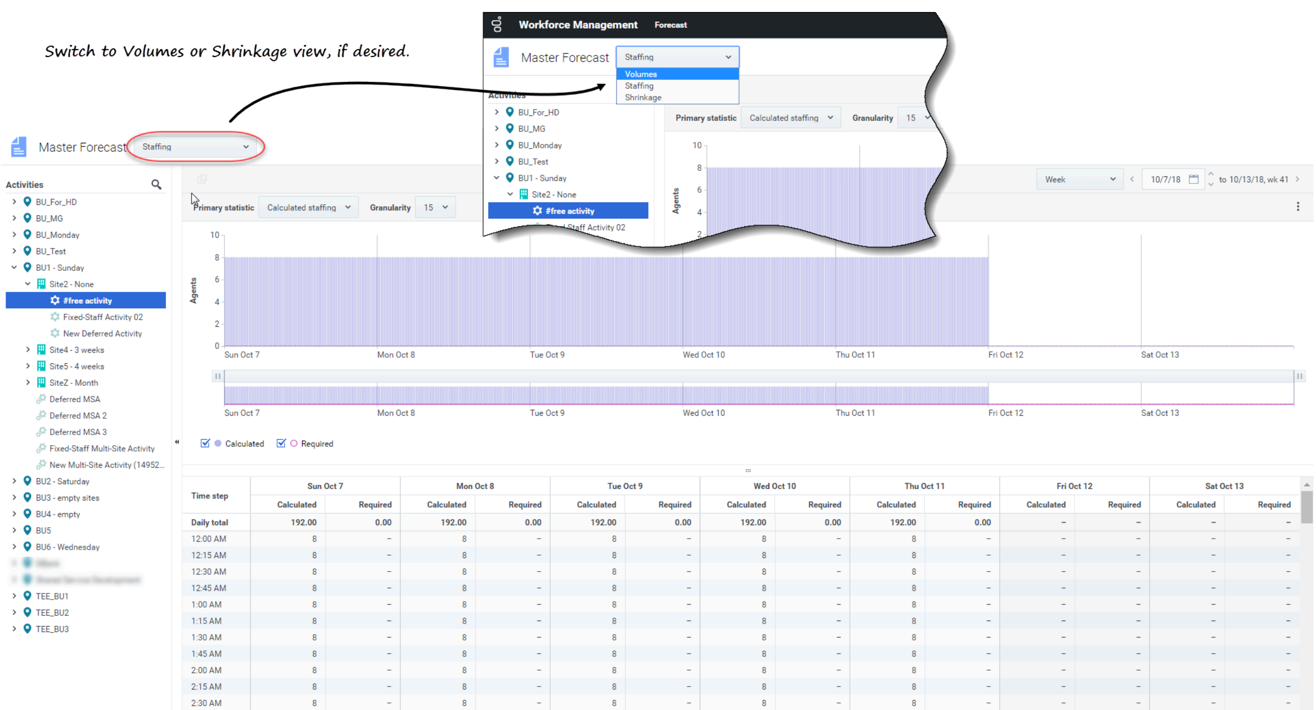
In the **Master Forecast** > **Volumes** grid, WFM enables you to copy and paste values to/from the actual columns only (**Actual IV** and **Actual AHT**). When selecting data for pasting, if you select cells in non editable columns, such as **IV Forcasted #**, only the cells in **Actuals #** columns are pasted.

You must have the Forecast access privilege **Edit Historical Data** to copy/paste data in this view.

For more information about copying and pasting volumes data, see Selecting data to copy and paste.

Viewing the staffing data

Use the Forecast Staffing view in the Master Forecast to display the required and calculated staffing data. This view provides standard date-selectors and a grid that shows statistics for days or timesteps.



Opening the Staffing view in the Master Forecast

1. In the navigation bar, select **Forecast** > **Staffing**.
2. In the **Objects** tree, expand a business unit to select a site, activity, or multi-site activity.

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

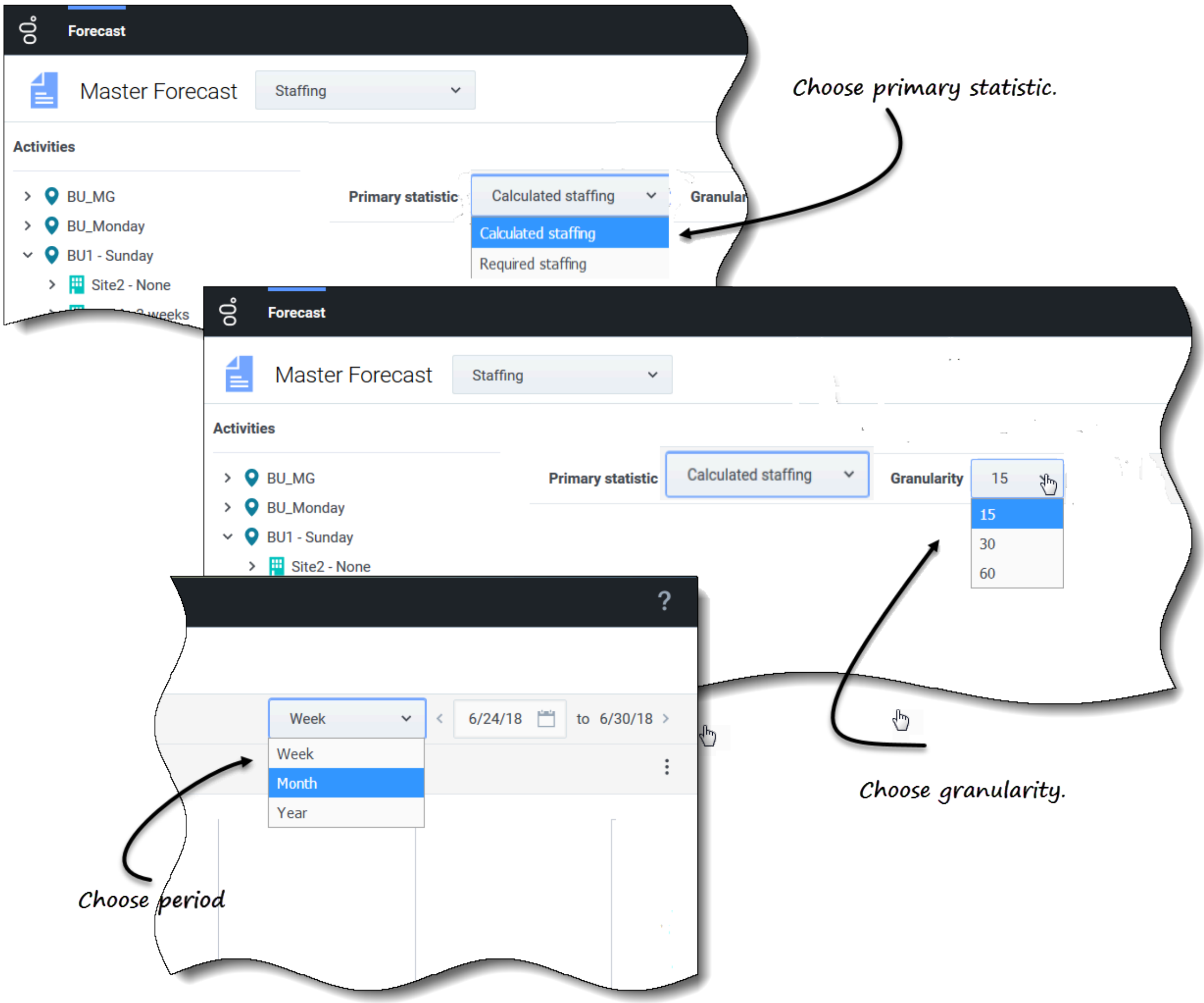
If you do not see any staffing data, you can adjust the Period drop-down list, the sliders (below the graph), or the Granularity and date-selectors at the top of the window to reflect those used for the forecast.

The grid displays open hours for selected site activities and multi-site activities in the same way.

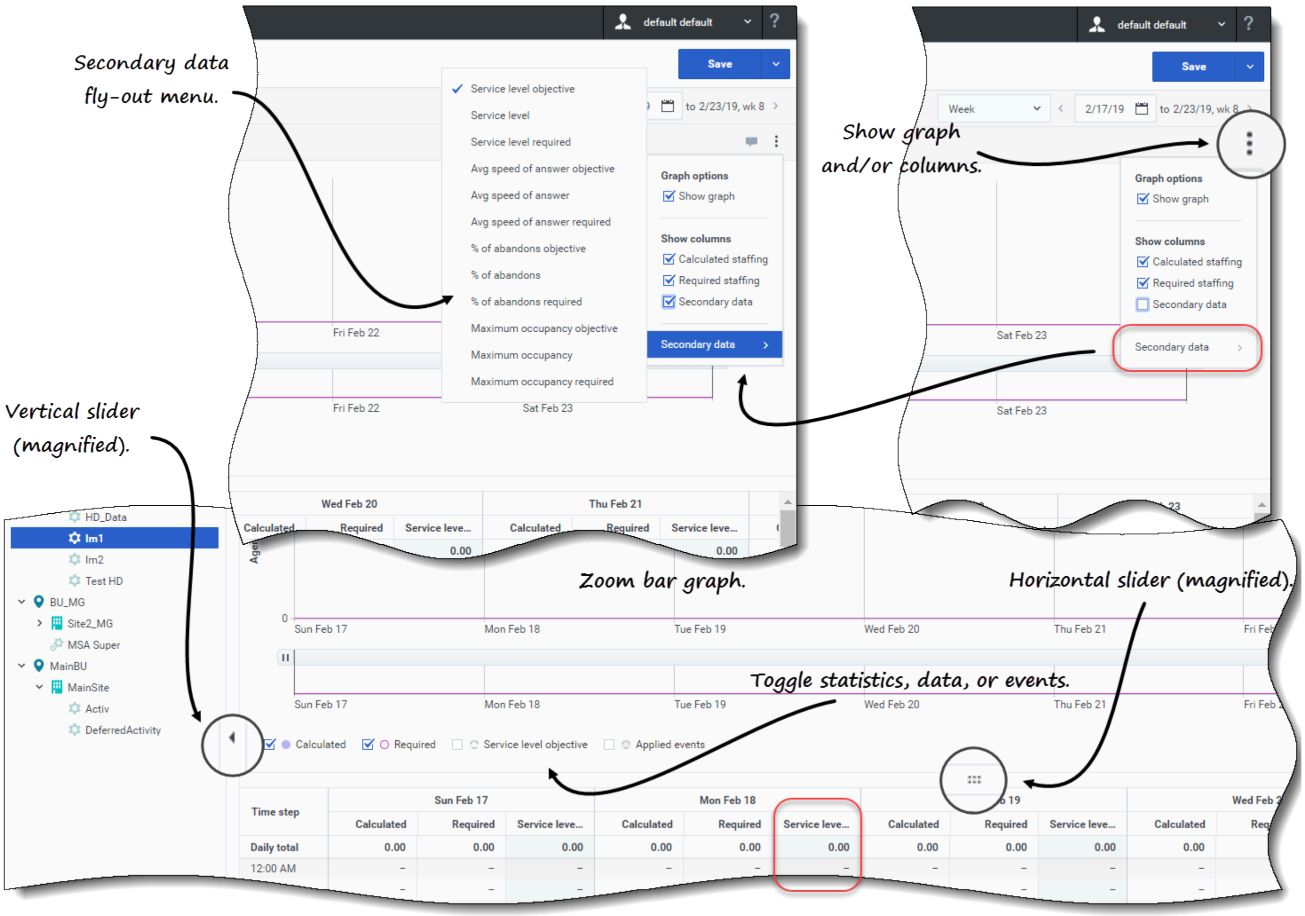
You can view the volumes or shrinkage data in the Master Forecast, by selecting Volumes or Shrinkage from the drop-down list in the top-left corner of this view.

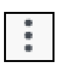
Setting the data display properties

In this view, use the following controls to customize the data display:



- **Primary statistic** *drop-down list*—Select the statistic that will be displayed as primary, by selecting **Calculated staffing** or **Required staffing**. The primary statistic displays as a bar in the graph and the secondary statistic displays as a red line.
- **Granularity** *drop-down list*—Select **Month** or **Year** to adjust the granularity to **Day**. Select **Week** to adjust the granularity to **15**, **30**, or **60** (minutes).
- **Period** *drop-down list*—Change the period or time range for the graph and grid by selecting **Year**, **Month**, or **Week**. If the selected site has a configured planning period, you can also select **Planning Period**.
- **Date range**—Use the date-selectors (top-right portion of the view) to switch to a different period within the scenario forecast's date range.



-  **Actions** *drop-down menu*—Click this icon to change the graph and/or table:
  - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also Sliders.
  - **Show columns**—Show/hide data columns in the grid by selecting/clearing the **Calculated staffing**, **Required staffing** or **Secondary data** check boxes.
  - **Secondary data**—Click this item to open a fly-out menu that list all of the secondary data types that can be displayed in the graph and grid.
    If Secondary data is checked in the Show columns section, the data type that you select from the fly-out menu is the name of the column that displays in the grid and the radio button/check box below the graph, and it displays as the y-axis statistic. To learn more, see Viewing the staffing secondary data.

  Click anywhere in the view to close the drop-down menu.

- **Toggles** *check boxes*—Below the graphic, toggle a statistic (Calculated, Required, Secondary data), or Appliled Events on or off in the graph. Selecting the check box or clicking the radio button toggles it on, and clearing the check box or clicking the radio button toggles it off. When checked, the radio button is:
  - solid blue for Calculated.

- outlined in magenta for Required.
- outline in a broken purple line for Secondary data.
- outlined in a broken yellow line for Applied events.

Watch the video demonstrating how the Sliders and Zoom bar graph (shown in the graphics above) work. The Smooth graph feature described in the first half of the video is not available In the **Master Forecast** views:

Reading the staffing data

The graph shows the staffing, dates, period, and granularity that you selected above. The vertical axis indicates the number of agents staffed. The horizontal axis displays different units for the staffing data.

To read and understand the staffing data, see this same to Reading the data in the **Scenario** > **Staffing** topic.

Viewing the staffing secondary data

In the **Master Forecast** > **Staffing** view, you can view secondary data in the graph and grid, in any granularity (Day, 15, 30, 60 minutes) and for any period (Week, Month, Year). Note that the secondary data column in the grid is read-only, and fixed-staff activities and multi-site activities do not have secondary data.

Displaying and viewing secondary data in the **Master Forecast** > **Staffing** view is the same as in Viewing secondary data in the Scenarios Staffing topic.

Editing the staffing data

In the Master Forecast views, if you select the period **Year** or **Month**, you can click inside the **Weekly Totals** cells in the grid and edit the value there. Find information about editing modes and see the editing procedure in Editing data in the grid in the **Scenarios** > **Staffing** topic.

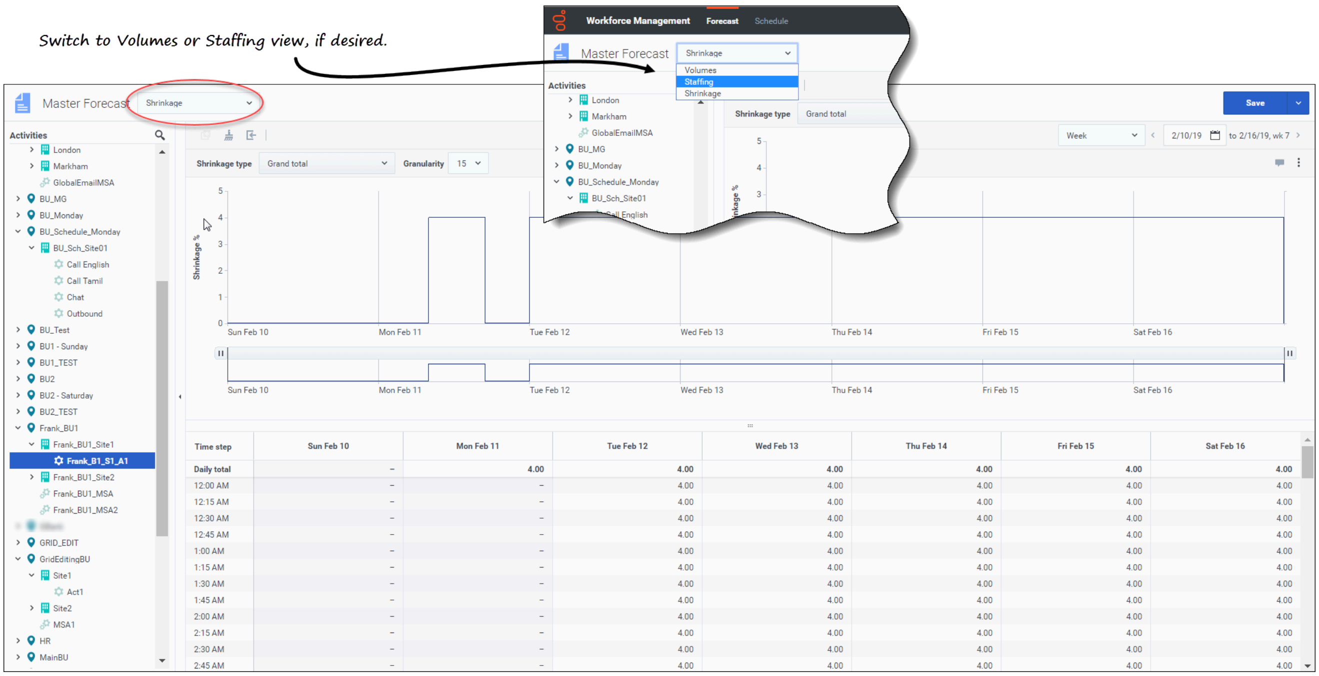
Copying and pasting the staffing data

In the **Master Forecast** > **Staffing** grid, WFM enables you to copy values from the **Calculated** and **Required** columns and paste them to external documents, such as Excel or Notepad. You cannot paste data in this view.

For more information about copying and pasting staffing data, see Selecting data to copy and paste.

Viewing shrinkage data

Use the Forecast Shrinkage view in the Master Forecast to display the overhead data, which WFM uses to forecast shrinkage while scheduling. This view provides standard date-selectors and a grid that shows statistics for days or time steps.



Opening the Shrinkage view in the Master Forecast

1. In the navigation bar, select **Forecast** > **Shrinkage**.
2. In the **Objects** tree, expand a business unit to select a site, activity, or multi-site activity.

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

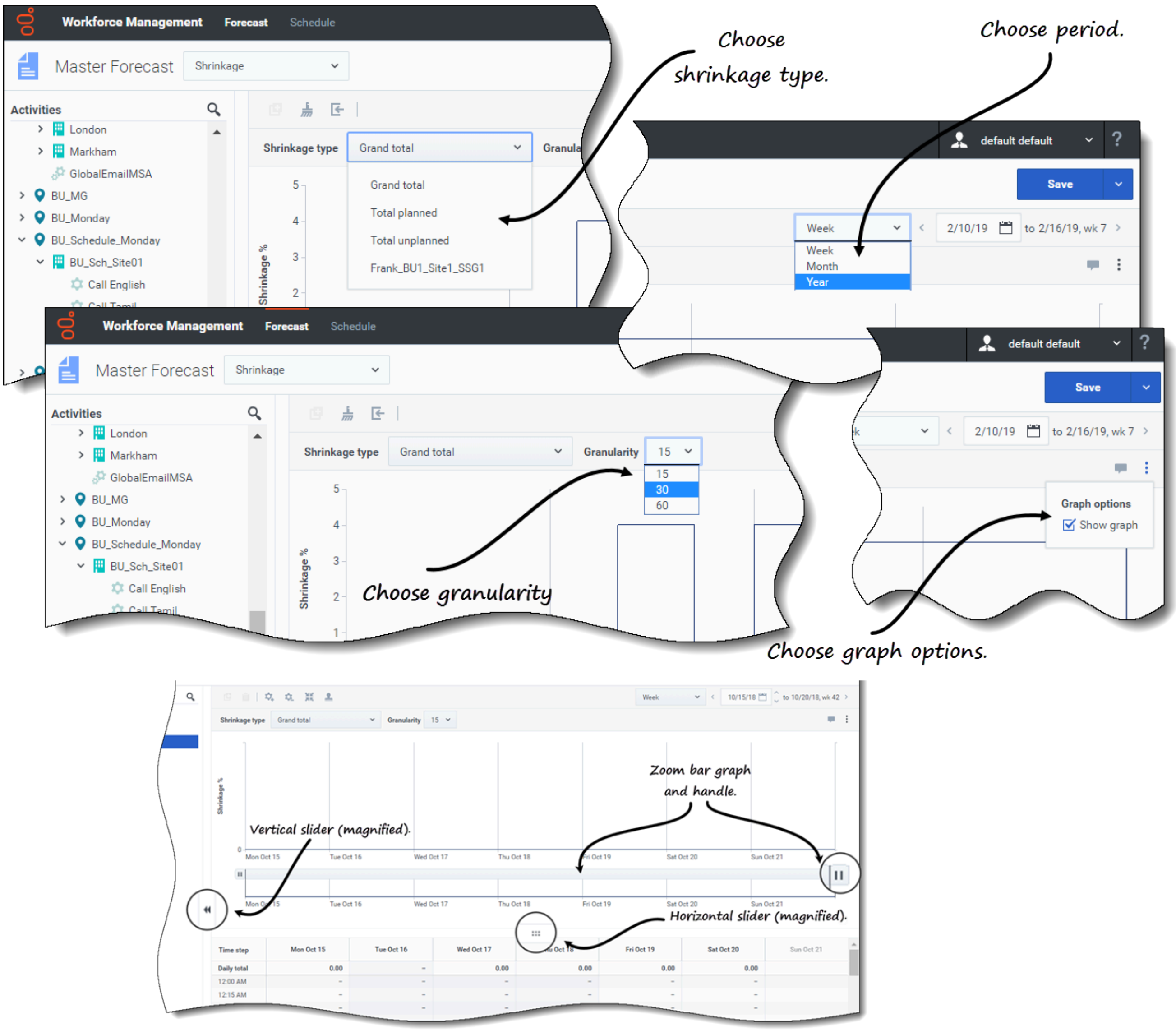
If you do not see any shrinkage data, you can adjust the Period drop-down list, the sliders (below the graph), or the Granularity and date-selectors at the top of the window to reflect those used for the forecast.

The grid displays open hours for the selected site activities and multi-site activities in the same way.

You can view the volumes or staffing data in the Master Forecast, by selecting Volumes or Staffing from the drop-down list in the top-left corner of this view.

Setting the data display properties

In this view, use the following controls to customize the data display:



- **Shrinkage type** *drop-down list*—Select the shrinkage type to be displayed by selecting **Grand total**, **Total planned**, or **Total unplanned**.
- **Period** *drop-down list*—Change the period or time range for the graph and grid by selecting **Year**, **Month**, or **Week**. If the selected site has a configured planning period, you can also select **Planning Period**.
- **Granularity** *drop-down list*—Adjust the granularity to **Day** if you selected **Month** or **Year** in the **Period** drop-down list. Adjust the granularity to **15**, **30**, or **60** (minutes) if you selected **Week** in the **Period** drop-down list.
- **Date range**—Use the date-selectors (top-right portion of the view) to switch to a different period within the scenario forecast's date range.

- **Actions** *drop-down menu*—Click this icon to change the graph and/or table:
    - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also Sliders.

Watch the video demonstrating how the Sliders and Zoom bar graph (shown in the graphics above) work. The Smooth graph feature described in the first half of the video is not available In the **Master Forecast** views:

Reading the shrinkage data

The graph shows the shrinkage type, date, period, and granularity that you selected above. The vertical axis indicates the shrinkage percentage. The horizontal axis displays different units for the shrinkage.

To understand the shrinkage data, see Reading the data in the **Scenarios** > **Shrinkage** topic.

Editing the shrinkage data

In the Master Forecast views, if you select the period **Year** or **Month**, you can click inside the **Weekly Totals** cells in the grid and edit the value there. Find information about editing modes and see the editing procedure in Editing data in the grid in the **Scenarios** > **Shrinkage** topic.

Copying and pasting the shrinkage data

In the **Master Forecast** > **Shrinkage** grid, WFM enables you to copy values from the columns in the grid and paste them to external documents, such as Excel or Notepad. You cannot paste data in this view.

For more information about copying and pasting shrinkage data, see Selecting data to copy and paste.

Finding events in forecasts

Find events for an activity or multi-site activity quickly by using the **Find Events** search dialog, available only in the **Master Forecast** > **Volumes** view.

When a **Find Events** search is initiated, WFM searches through historical data for any period of time that represents an anomaly. For example: imagine that the AHT on May 24, 2008, between 8 p.m. and 9 p.m. was 500% higher than on the historical norm for those hours. The **Find events** search dialog can quickly locate this anomaly in the historical data for you when it might otherwise be hard to find.

The **Find events** dialog opens with **Possible events** selected by default and contains the default values for the statistic, granularity, and start and end dates based on the Master Forecast Volumes primary statistic, granularity, and date range. You can change any of these default settings.

Understanding event types

This Help mentions three types of events, as follows:

- Applied Events—You apply these when you are building volumes. These events are equal to or a subset of **Existing events**.
- Existing Events—You define or add these in the **Overlays** view.
- Possible Events—WFM calculates these using the Find events feature (described in this topic), based on historical data.

When selected in the results pane, **Possible events** appear in a yellow bar graph and **Existing events** appear in a striped pink bar graph.

Events can sometimes overlap. When this happens, hover your cursor over the overlapping area or non-overlapping area to display the event name and date.


Find Events
New search
Search Preview
Show
Possible events (0)
Existing events (3)
Overlay [7]
New Event
11/8/18 4:00 PM - 11/17/18 4:00 PM
Tejaswini edit fffdd
Overlay Event [1]
5/30/18 12:00 AM - 5/31/18 12:00 AM
Tejaswini edit fffdd
Overlay Event [2]
6/12/18 12:00 AM - 6/13/18 12:00 AM
Existing events
Results for Existing events.
Start a new search.
Possible events (3)
Existing events (0)
No events within the time range.
You do not have any overlay events
Search Preview
Hide
Statistic: IV
Granularity: Hours
Start date: 5/1/18
End date: 12/14/18
Threshold: 5%
Show/hide search criteria.
4/2/18 12:00 AM - 4/3/18 12:00 AM
4/4/18 8:00 AM - 4/4/18 6:00 PM
4/5/18 11:00 AM - 4/7/18 12:00 AM
Results for Possible events.
Possible events
Create overlay or event.
New overlay
New event
default default
Save
The selected event displays in the graph.
Week
4/2/18
to 4/8/18, wk 14
Fri Apr 6
Sat Apr 7
Sun Apr 8
AHT seconds

Finding events in a forecast

1. Open the Master Forecast.
2. In the **Volumes** view, expand business units and sites in the Objects pane and select an activity or multi-site activity.
3. Below the date range, in the toolbar, click **Find events** .
   The Find events dialog opens.
4. Retain the defaults, or select the **Data** type **(IV**, **AHT**) and **Granularity** (**Daily**, **Hourly**) on which to search.
5. Retain the defaults, or select a **Start date** and **End date**.
6. Enter the **Threshold** percentage (between 1 and 1000).
   This is the percentage of deviation from historical data, that would identify the event you want to locate.
7. Click **Find events**.
   When WFM completes the search, the dialog displays the results in two categories with the number of events found in brackets:
   - **Possible events ()**
   - **Existing events ()**

   Click either one of the radio buttons to see the result for that category.

Items in both results list display in the format . **Existing events** items also show the event name above the date/time range.

Selecting an event in either list changes the primary statistic, granularity, and date range in the toolbar, if applicable. If there are no events to display, you'll see the message *You do not have any overlay events.*

In the results dialog, you can also:

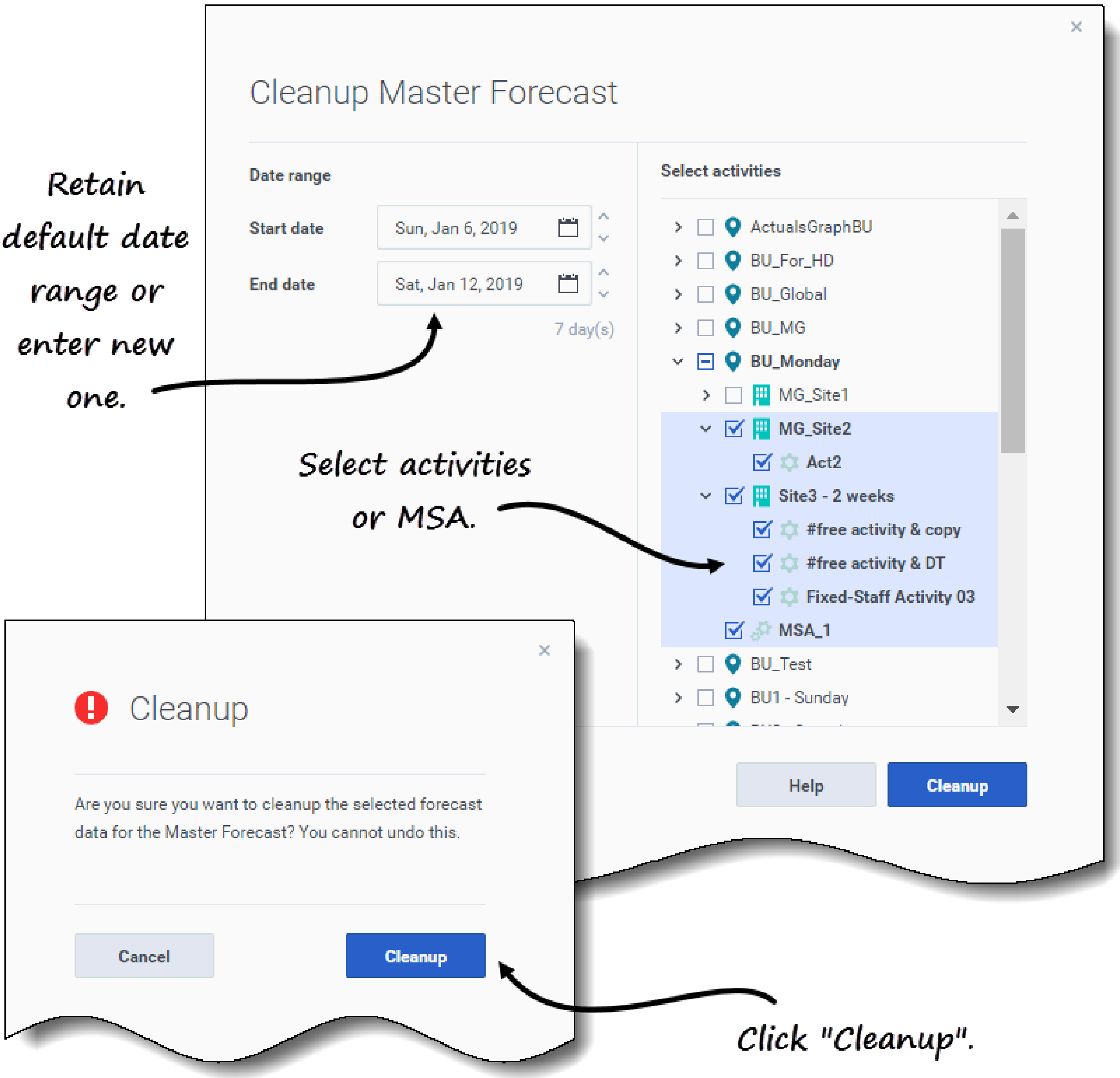
- Start a new search, by clicking the arrow (**) beside New search.**
- Show/hide the search criteria in the results dialog by clicking **Show** or **Hide**.
- Create an overlay, by clicking **New overlay** (enabled only if **Possible events** is selected).
  This action opens the New Overlay wizard.
- Create an event, by clicking **New event** (enabled only if **Possible events** is selected).
  This action opens the New Event wizard. It contains a list of overlays and default values that are based on the search criteria. New events appear in the existing events list if it falls within the date range. If you enter an event name that already exists, WFM displays an error message in the New Event dialog.
- Close the dialog, by clicking the **X** in the upper-right corner.
- Cancel the search, by clicking **Cancel** or **X** in the upper-right corner of the progress dialog. WFM preserves your selections in the **Find events** dialog.

Cleaning up data in the forecast

From time to time, you might need to remove information from the Master Forecast for specific dates, activities, or multi-site activities (MSA). WFM simplifies this task by providing the **Cleanup** feature in all three Master Forecast views. You can clean up data for one or more business units, sites, activities, or MSA.

Warning

Be careful when using this feature. It deletes all of the saved data for the selected date range and activities or MSA. Genesys recommends that you do not use the **Cleanup** feature unless it is absolutely necessary. If you must remove Master Forecast data, Genesys recommends that you first extract the data to a forecast scenario (using the Publish or Extract wizard), and/or make a backup of the WFM database.



Removing data from Master Forecast for a specified date range

1. Open a view in the Master Forecast (Volumes, Staffing, or Shrinkage).
2. Click **Cleanup**.
   The Cleanup Master Forecast dialog opens.
3. In the **Start date** and **End date** fields, enter (or select from the calendar) the range of dates for which you want to remove data.
4. Expand the tree to select the business units, sites, activities, or MSA for which you want to remove data.

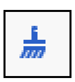
5. Click **Cleanup**.
6. In the **Cleanup** dialog, if you are sure you want to complete this action, click **Cleanup**.
7. When the dialog indicates that the process is complete, click **OK**.

Click **Cancel** or **X** in the upper-right corner at any point to close the dialog without changing the Master Forecast.

> **Important**
> If you click **Cancel** or **X** when the cleanup is in progress, WFM might or might not preserve the data, depending on how much of the process is complete.

Using the toolbar

You can use the following buttons on the toolbar in all Master Forecast views:

Icon	Name	Description
	**Copy**	Copies data selected in the grid to the clipboard.
	**Cleanup**	Opens the Cleanup Master Forecast dialog, enabling you to remove data from the **Master Forecast** for selected dates, activities, or multi-site activities.

Performance

- Supervisor

Learn how to display performance statistics for business units, sites, and activities.

Related documentation:

Use the following **Performance** views to display performance statistics for business units, sites, and activities:

- Monitor view, for the most recently completed timestep
- Intra-Day table view
- Alerts view

You can compare actual site performance with planned performance using key indicators, such as Service Level and Average Speed of Answer (ASA).

All views display the following statistics, which are calculated by the WFM servers:

Interaction Volume	Forecast and Actual number of interactions.
AHT (Average handling Time)	Forecasted, Actual, Difference, and Difference % in the average handling time, in seconds.
Abandoned Interactions (%)	Scheduled, Calculated, Required, and Actual percentage of abandoned calls.
Service Level (%)	Scheduled, Calculated, Required, and Actual service level percentage.
Deferred Service Level (%)	Scheduled, Calculated, Required, and Actual deferred service level percentage.
Actual Queue	The actual number of interactions in the backlog queue at the end of the period.
ASA (Average Speed of Answer)	Scheduled, Calculated, Required, and Actual average speed of answer, in seconds.
Staffing (also includes Coverage)	For Staffing, this shows the number of agents Calculated and Required for each activity. These

	values are taken from the forecast and are always whole numbers. For Coverage, this shows the number of agents scheduled for each activity. If an agent works only part of a time interval, only the portion during which the agent works (rounded to the nearest minute) is counted toward scheduled staffing. As a result, these values may be fractions or decimals.
Variance	Scheduled and Required variance. Optimal staffing value for the timestep minus the scheduled number of agents (Sch.), and the optimal staffing value for the timestep minus the required number of agents (Req.). Tip *Optimal staffing* is a calculation based on actual interaction volume, actual AHT, and the service objectives specified in the forecast. This value is not displayed on its own, but is used in calculating Variance values.
Headcount	Scheduled and Actual headcount. Number of scheduled (Sch.) and actually working (Act.) agents. For more information, see description of Headcount in the Master Schedule Summary view.

These statistics are presented for a 24-hour range, with 12 hours before, and 12 hours after, the current timestep. The displayed data is automatically refreshed at least once per minute.

For timesteps in the future, the displayed "actual" values are those that WFM Web anticipates by comparing past data with the planned forecast. These anticipated values do not affect the schedule, and they are not saved.

The anticipated values can help you make real-time changes to your site setup. For example, unneeded agents can be sent home if you are overstaffed, or extra agents can be called in if you are understaffed. You cannot change the schedule from the Performance views; use the Master Schedule Intra-Day view to do so.

Tip

For timesteps that have an interaction volume of zero, you can display service-level data as either 0% or 100%. This is determined in Configuration Server by the WFM Server application’s **Options** tab > **PerformanceService** section > **NoCallsServiceLevel** key, whose value can be set to either `0` or `100`. The default value is `0`.

Performance Monitor View

Contents

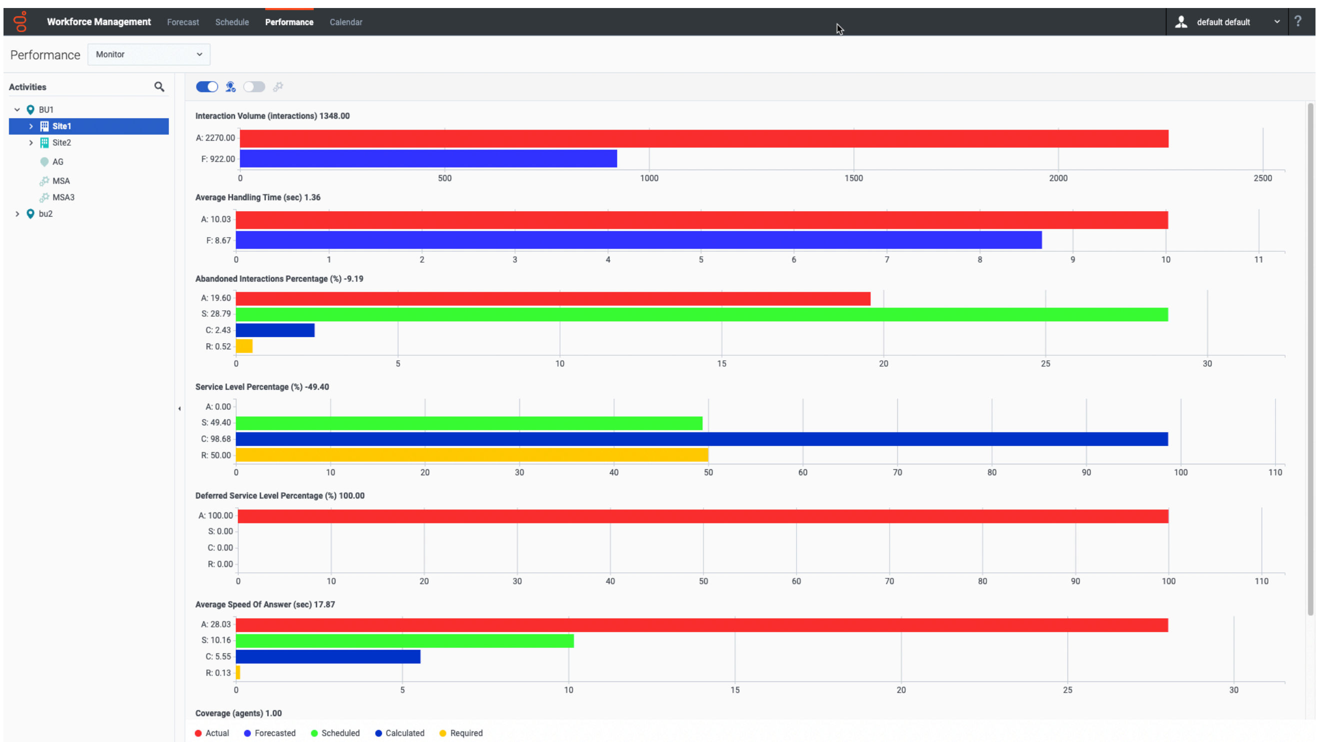
- 
- Supervisor

Use the Monitor view to display performance statistics for the most recently completed timsetep.

Related documentation:

-

Displaying the Monitor view



To display the **Monitor** view, click the **Performance** tab and select **Monitor** (or use the **Performance** view dropdown list to switch the view to **Monitor**). If you switched to this view from another Performance view, it retains your earlier **Activities** tree selection and shows graphs for the most recent timestep.

From the **Activities** tree, select the business unit, multi-site activity, activity group, or site you want to view. You can expand business units to show their sites, activity groups, and multi-site activities, and expand sites to show their activities. If you make a new selection, the graphs refresh to match it.

You can also click the **Search** icon to open the search bar and enter the name of the object you want to find and view.

Reading the data

The **Monitor** view shows as many graphs as can fit on the screen at once. Use the scroll bar to the right to reveal graphs for additional statistics.

Each graph shows actual data, and either forecasted data or scheduled and required data. The displayed data is automatically refreshed at the conclusion of each 15-minute timestep, and represents the values from the most recent timestep.

The Legend (at the bottom) shows which color bar indicates which data category. Next to each data bar, a label lists the numerical value shown on the graph, with the following prefixes:

- A for actual data
- F for forecasted
- S for scheduled
- C for calculated
- R for required

> ### Tip
> Scheduled metrics such as scheduled Average Speed of Answer (sec), Scheduled Service Level Percentage, and so on, describe what objectives you should meet based on the number of agents scheduled.

If alerts were configured for a statistic and that statistic exceeds the alert's configured deviation level, a red ALERT icon () appears near the graph.

Required data options

You can use the following controls to change the required data viewing options:

Icon	Name	Description
	**Show Required**	Toggle this slider on to display the required data in the Abandoned Interaction Percentage, Service Level Percentage, Deferred Service Level Percentage, Average Speed

Icon	Name	Description
		Of Answer, and Coverage graphs.
	**Use Multi-site Activities**	This option becomes enabled when you select a multi-site activity or business unit. Toggle this slider on to display data for the selected multi-site activity (this parameter determines the target that is used for values aggregation). WFM retains your last selection in the current view and for all other views that contain multi-site activities.

Performance Intra-Day View

Contents

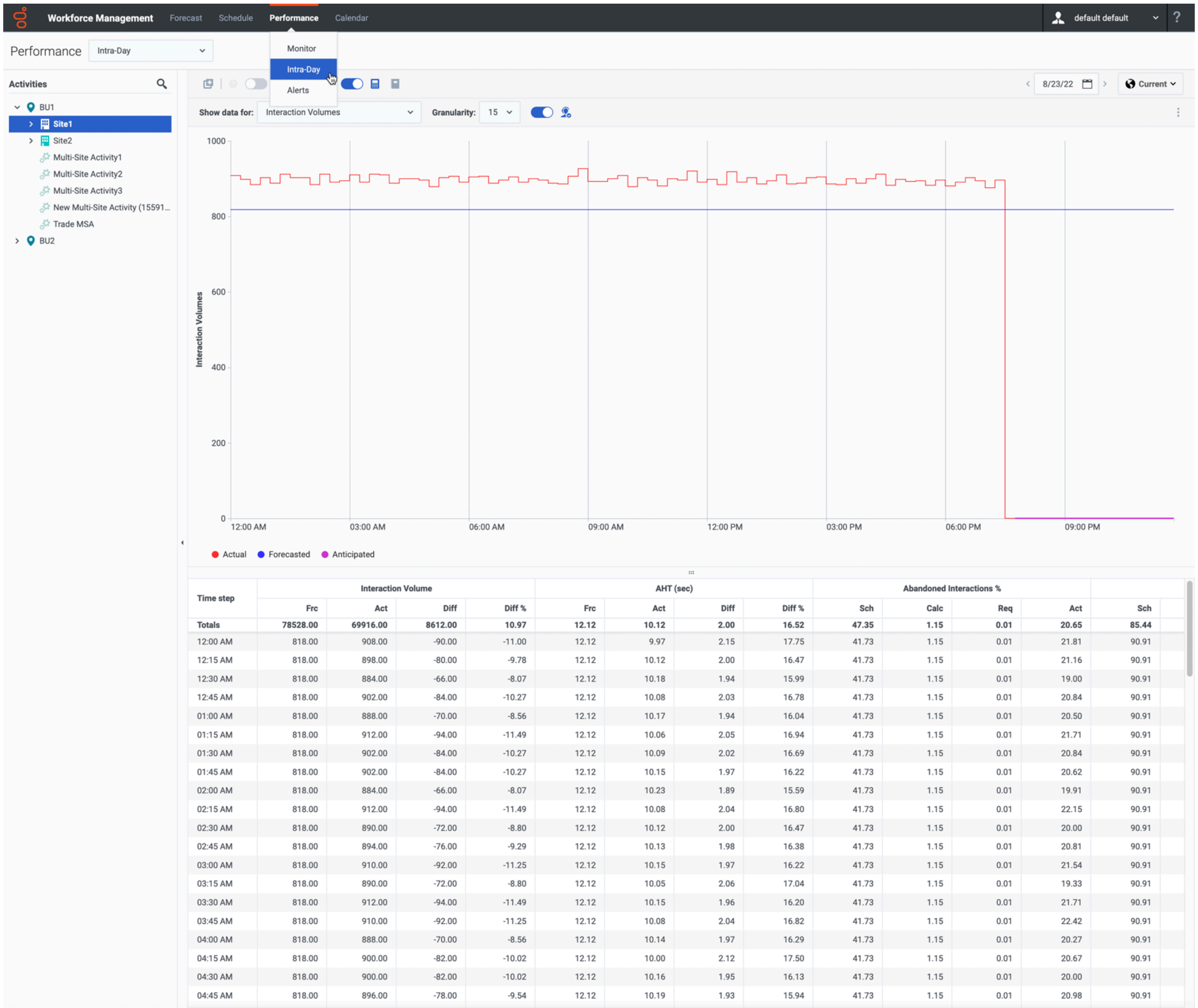
- 
- Supervisor

Use the Intra-Day view to display performance statistics (both summarized and detailed) in a grid.

Related documentation:

-

Displaying the Intra-Day view



To display the Intra-Day view, select **Intra-Day** from the **Performance** module menu (or use the Performance view dropdown list to switch the view to **Intra-Day**). If you switch to this view from another Performance view, it retains your earlier **Activities** selection and shows the corresponding statistics.

From the **Activities** tree, select the business unit, multi-site activity, activity group, or site you want to view. You can expand business units to show their sites and activity groups and multi-site activities, and expand sites to show their activities. If you make a new selection, the grid is updated to match it.

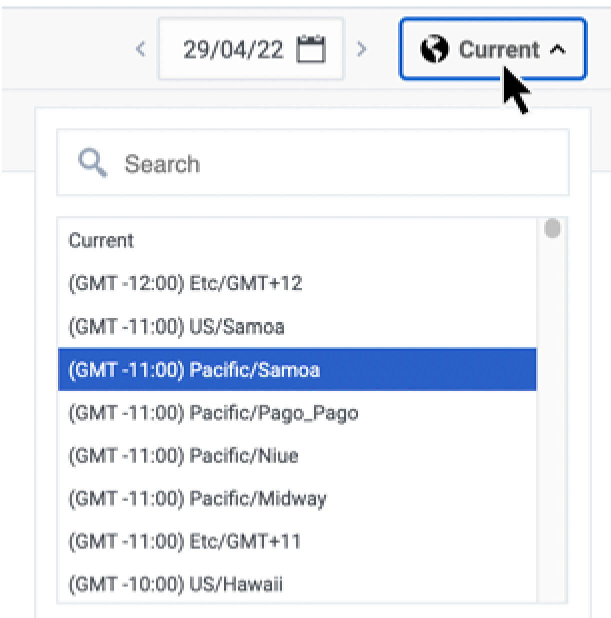
You can also click the **Search** icon to open the search bar and enter the name of the object you want to view.

Setting the Time Zone, Granularity, and Date

Use the **Time Zone**, **Granularity** and **Date** controls to customize the graph.

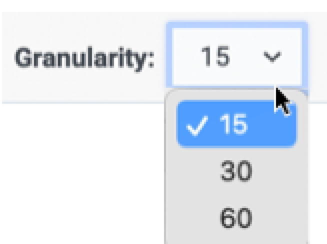
Time Zone

Use the **Time Zone** dropdown list (at the top right-hand side of the screen) to choose the time zone to display in the graph and grid. By default, this is set to **Current** (the local time zone).



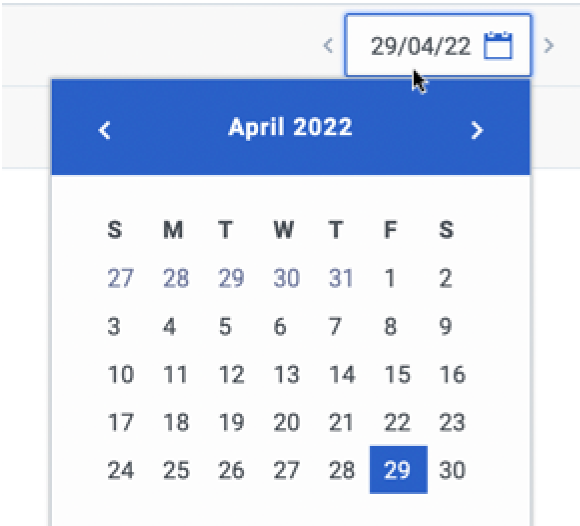
Granularity

Use the **Granularity** dropdown list to select the time interval (in minutes) for the graph's horizontal axis, and also for timesteps in the table below the graph. You can select **15** (default), **30**, or **60** minutes.



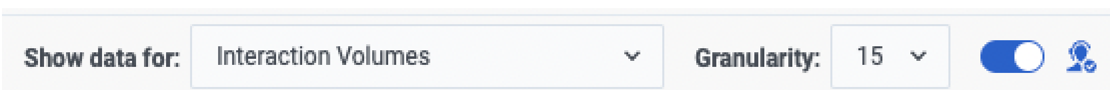
Date

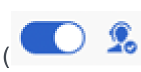
Use the calendar tool to choose the **Date** to display in the graph and grid. By default, this is set to the current date.



Reading and configuring the graph

By default, information for the **Interaction Volumes** statistic is shown.



- To switch the graph to match a different statistic, select the statistic from the **Show Data for** list.
- Toggle the **Show Required** slider on () to display required data in the graph.

The graph shows *times* on the horizontal axis and *values* on the vertical axis. The legend (below the graph) indicates which color is used for each data category.

Reading and navigating the grid

For each statistic, the grid displays actual values compared to forecasted, or scheduled and required, values. The displayed data is automatically refreshed at the conclusion of each 15-minute timestep, and represents the values from the most recent timestep. The grid's rows show timesteps, and its columns show statistic categories. The current timestep is identified by a yellow background.

By default, the **Show Whole Day** toggle on the **Actions** toolbar is switched on to display a current-day view that shows midnight to midnight of the current day. Switch it off to instead display a rolling view that shows 12 hours before and 12 hours after the current timestep. This toggle is disabled if the day selected in the Date selection control is not a current date. When switched on, the performance grid starts at midnight.

> **Tip**
> When WFM is unable to calculate a value for a particular timestep, or if no value has yet been entered for it in forecast views, the cell contains a minus sign (–).

Grid Rows

The grid contains the following rows, which are labeled in the **Time Step** column:

First row (--)	The first row displays summary (aggregate total or average) values for each statistic, calculated from the grid's first displayed timestep until the current timestep.
Timestep rows (numbered)	The remaining rows show 15-, 30-, or 60-minute timesteps. There are 24 hours' worth of data, which may be shown as including 12 hours before, and 12 hours after, the current timestep (rolling view) or from midnight to midnight of the current day (Current Day view). The Current Day view is the default view. Use the scroll bar to the right to reveal more timesteps. A yellow bar indicates the current timestep.

Grid Columns

The grid's remaining columns show the following statistics and subcategories (these statistics are present in all views, and are described in the Performance overview):

- Interaction Volume
- AHT
- Abandoned Interactions
- Service Level
- Deferred Service Level
- Actual Queue
- ASA
- Staffing
- Variance
- Coverage
- Headcount

Anticipated Values

For Interaction Volume and AHT, future "actual" timestep values are calculated based on the ratio of previous actual/forecast values from moment to moment. For the other columns, values for future timesteps are forecasted based on anticipated IV and AHT. Actual values replace these anticipated values as the displayed data is refreshed.

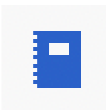
Display, copy/paste, and other options

The Intra-Day view allows you to copy data from the grid to the clipboard and then paste it into another application. You can use the **Copy** button ( ) provided on the toolbar or use your operating system's copy keyboard shortcut (such as **Ctrl+C** or **Command+C**).

Toolbar buttons

You can use the following buttons on the toolbar:

Icon	Name	Description
	Copy	Click to copy data from the grid to the clipboard so you can paste it into another application.
	What-if?	Click to launch the What-If Window to immediately analyze how changes in some statistics would affect other factors.
	Use Multi-site Activities	This slider is enabled when you select a multi-site activity or business unit in the **Activities** tree. When switched 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.
	Show Whole Day	Toggle this slider on (default) to display a current-day view from midnight to midnight of the current day. When switched off, displays a rolling view of 12 hours before and 12 hours after the current timestep.
	Total Forecasted Values for Whole Day	Toggle this slider on to calculate totals across the grid's top row using actual performance data (displayed above the horizontal yellow line that indicates the

Icon	Name	Description
		current time slot) and forecast data (displayed below the line). When toggled off, it calculates totals across the grid's top row using actual performance data only. Tip This option affects only how the totals row is calculated, using the currently displayed data.
	**Move to Current Day**	Click to display data for today.
	**Options**	Click to display the Performance Options dialog with a list of statistics that can be displayed in the grid.

Displaying statistics in the grid

Selecting the **Options** button in the Performance Intra-Day view opens the **Show Statistics** dialog, which contains a list of statistics that can be displayed in the grid. By default all are selected. To clear or select any individual statistic, click its check box. There is a check box at the top of the list that selects or clears all statistics at once.

Click **Done** to accept your changes or **Cancel** to abandon them.

For a list of statistics and their descriptions, see Performance.

Performance Alerts View

Contents

- 
- Supervisor

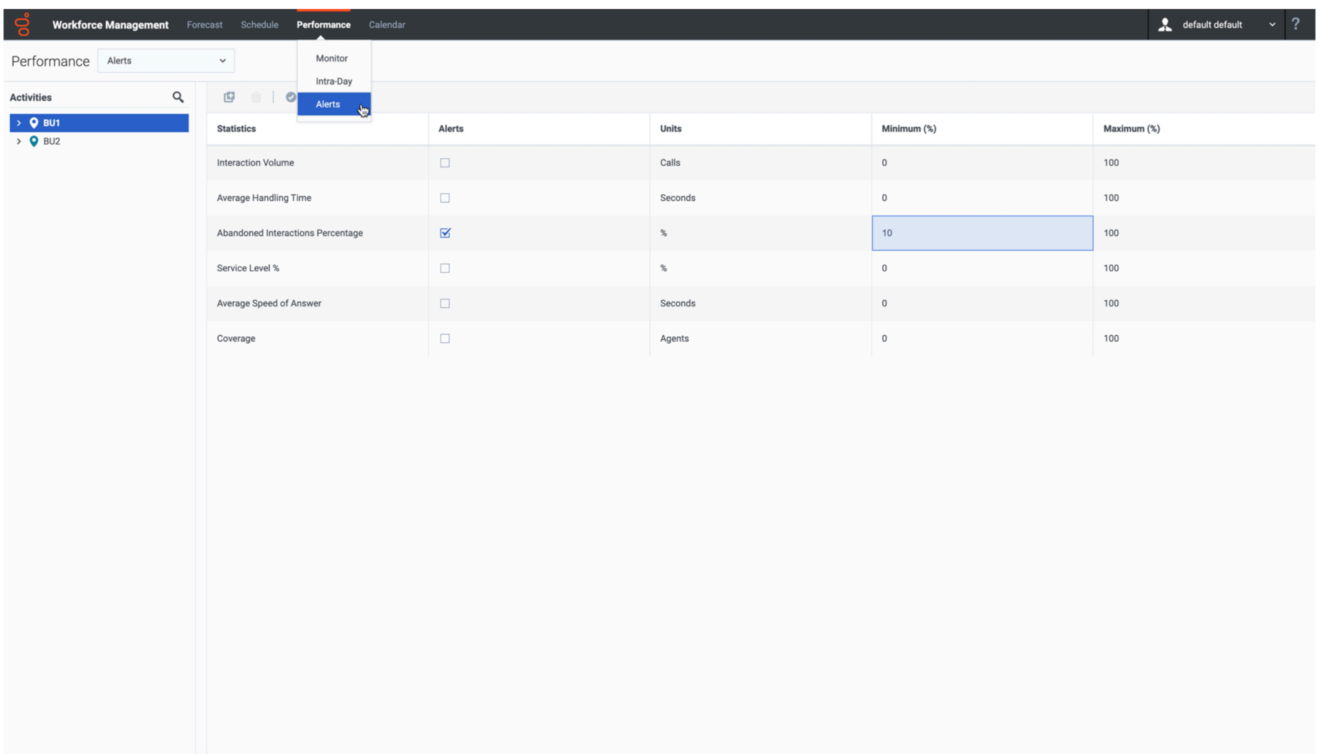
This topic describes how to configure visual alert notifications for unacceptable performance.

Related documentation:

-

You can use the **Alerts** view to configure visual alert notifications for unacceptable performance. The **Alerts** function uses Master Forecast and schedule data as a baseline for acceptable performance results. If user-defined performance limits are violated (for example, if too many interactions are being abandoned, or if service levels fall too low), an Alert warning ( ) in the Monitor view notifies site managers that action may be necessary.

Displaying the Alerts view



To display the **Alerts** view, click the **Performance** tab and select **Alerts** (or choose **Alerts** from the

Performance module dropdown list).

From the **Activities** tree, select the business unit, multi-site activity, activity group, or site you want to view. If you switched to this view from another Performance view, it retains your earlier **Activities** tree selection. At right, the deviation details are refreshed with any alert settings that have already been configured for your selection.

Configuring performance alerts

To set an alert on a different business unit, site, or activity, select it in the **Activities** tree. You can expand business units to show their activity groups and sites and expand sites to show their activities. If you made a new selection, the deviations are updated to match it.

Select the **Alerts** check box beside each statistic name for which you want an alert. Clear the check box for statistics that should not have alerts.

Set the **Minimum (%)** and **Maximum (%)** allowable deviation for each statistic whose check box you selected. Set these limits by double-clicking on the cell and typing in the appropriate columns. These limits define the variance beyond which an alert is displayed. For example, assume that you set 3.0 as the Minimum (%) deviation level for Average Handling Time, and 5.0 (%) as the Maximum (%). In this case, an alert appears when the AHT goes more than 3 percent under, or 5 percent over, the number set in the forecast.

Click **Apply** ( ). Or, to discard your changes, click **Cancel** ( ).

If desired, configure alerts for other Business Units, activity groups, sites, or activities. You can repeat these steps for as many **Activities** tree selections as you like. If you make a new selection without first clicking **Apply**, a dialog box prompts you to **Save** your changes, **Discard** them, or click **Cancel** to keep working with the same selection.

To exit the **Alerts** view, select a different view from the **Performance** menu or module list.

What-If Window

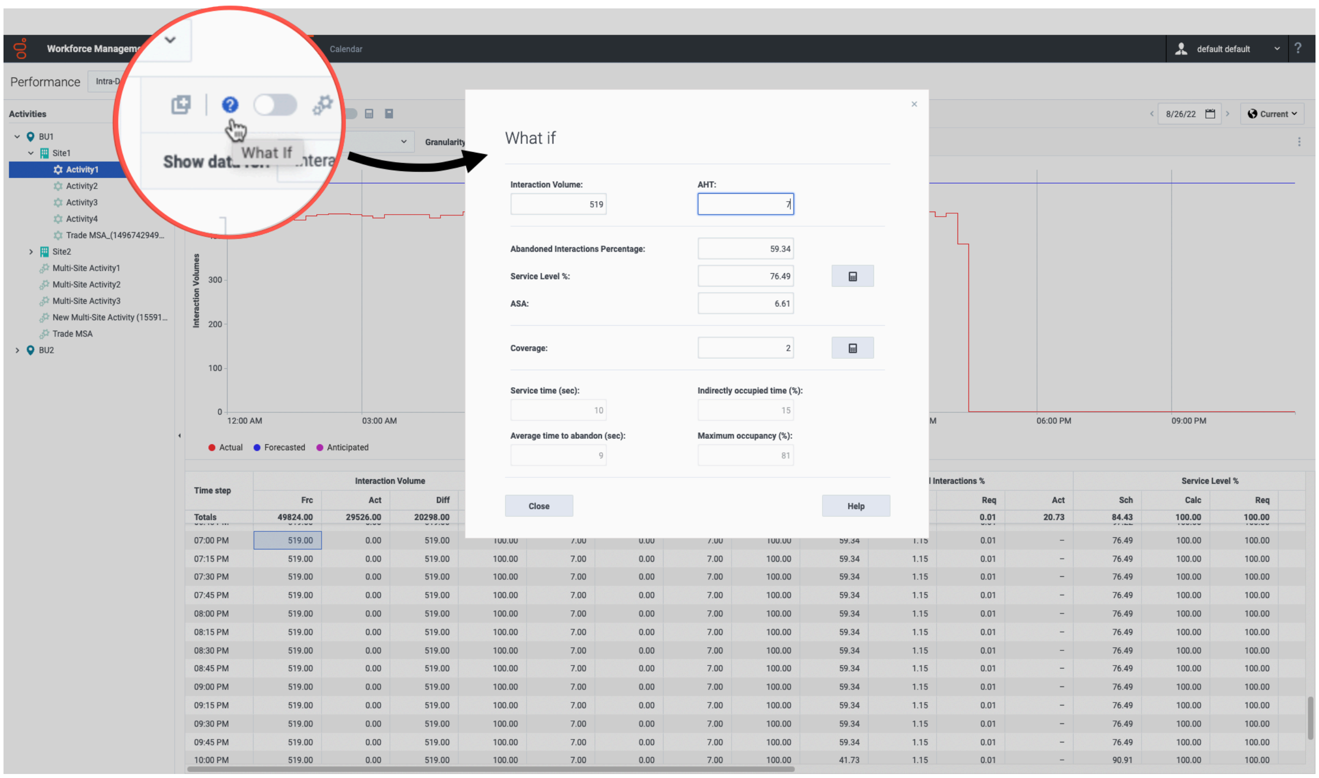
Contents

- 
- Supervisor

Analyze how changes in statistics affect other factors by using what-If scenarios.

Related documentation:

-



Use the What-If window to immediately analyze how changes in some statistics would affect other factors.

To open the What-If window:

- Select an activity in the **Performance Intra-Day** module.
- Select a timestep in the data grid.
- Click the **What if** button ( ) on the **Actions** toolbar.

Once the window is open, you can change certain values shown in the window to perform what-if calculations.

Statistics in the What-If window

Statistics presented in the **What-If** window are as follows (these statistics are present in all views, and are fully described in the Performance overview):

Interaction Volume	Initial value is the forecasted interaction volume taken from Master Forecast. Enter a value greater than zero.
AHT (Average Handle Time)	Initial value is the forecasted AHT taken from Master Forecast. Enter a value greater than zero.
Abandoned Interactions Percentage	Initial value is the scheduled abandoned calls percentage. Enter a value greater than 0 and less than 100. If you do not enter a value, the abandoned calls percentage is not included in the what-if calculation.
Service Level %	Initial value is the scheduled service level percentage. Enter a value greater than 0 and less than 100. If you do not enter a value, the service level is not included in the what-if calculation.
ASA (Average Speed of Answer)	Initial value is the scheduled average speed of answer. Enter a value greater than zero. If you do not enter a value, ASA is not included in the what-if calculation.
Coverage	Initial value is the scheduled coverage. Enter a value greater than zero.
Service time (sec)	Taken from Master Forecast. Configured in Building staffing. If a forecast has not been built, these indicators are empty.
Average time to abandon (sec)	Taken from Master Forecast. Configured in Building staffing. If a forecast has not been built, these indicators are empty.
Indirectly Occupied Time (%)	Taken from Master Forecast. Configured in Building staffing. If a forecast has not been built, these indicators are empty.
Maximum Occupancy (%)	Taken from Master Forecast. Configured in Building staffing. If a forecast has not been built, these indicators are empty.

Calculating what-if scenarios

To calculate what-if scenarios, you must have the following:

- Published forecast values for interaction volume and AHT (which initialize the window's first two fields), abandonment, service level, ASA, indirectly occupied time, and maximum occupancy.
- A published schedule that allows staffing suitability calculations. (This initializes the window's Coverage field.)

You can calculate what-if scenarios for the group of service-level statistics (abandoned calls, service level, and average speed of answer (ASA)), or for the coverage level.

Calculating Abandoned Interactions Percentage, Service Level, and ASA

To calculate what-if scenarios for Abandoned Interactions Percentage, Service Level percentage, and ASA:

- Enter values into the **Interaction Volume** and/or **AHT** fields.
- Enter a value into the **Coverage** field.
- Click the **Calculate** button ( ) next to the **Service Level %** field.

The window shows the expected impact of your changes on the Abandoned Interactions Percentage, Service Level percentage, and ASA. If a field is empty, there is no data for the appropriate statistic for that timestep.

Calculating coverage scenarios

To calculate what-if scenarios for coverage:

- Enter values in the **Interaction Volume** and **AHT** fields.
- Enter values into the **Abandoned Interactions Percentage**, **Service Level %**, and/or **ASA** fields. For the calculation to be successful, you must enter a value in at least one of these fields.
- Click the **Calculate** button ( ) next to the **Coverage** field.

The window shows the expected impact of your changes on Coverage.

Closing the What-If window

When you have completed your calculations, click **Close**.