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Workforce Management Supervisor Help

Common forecasting tasks

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

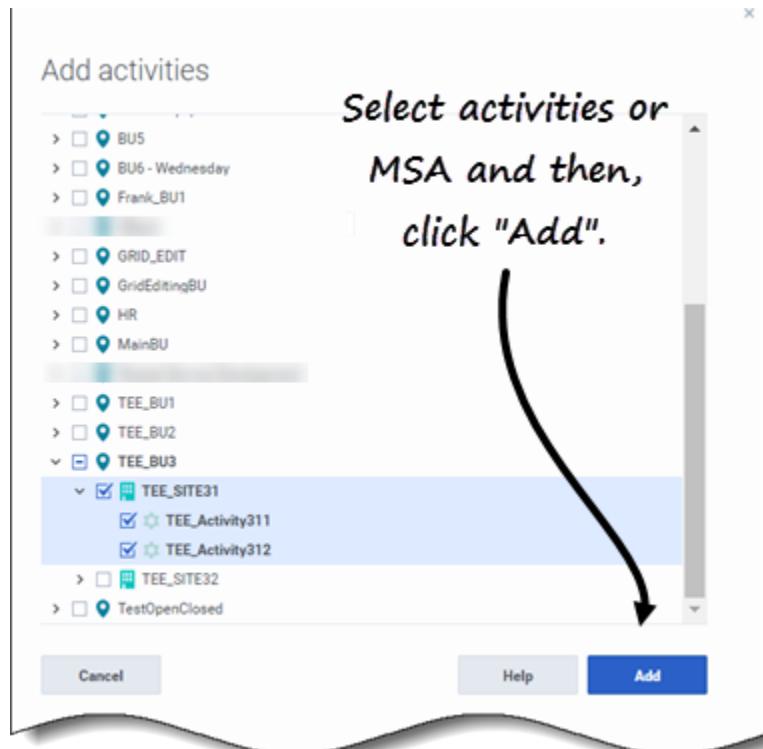
Related documentation:

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:

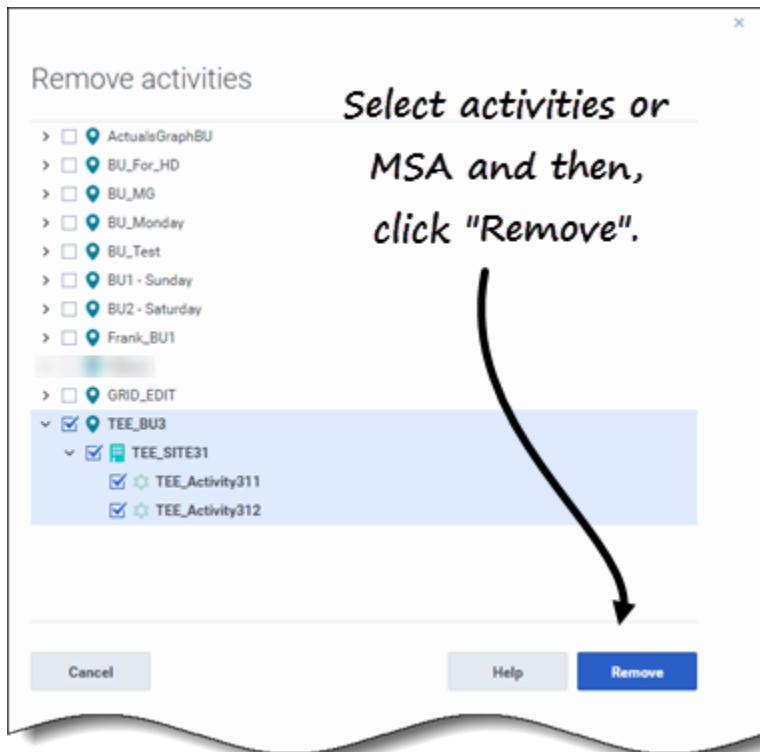
1. Open a scenario.



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:

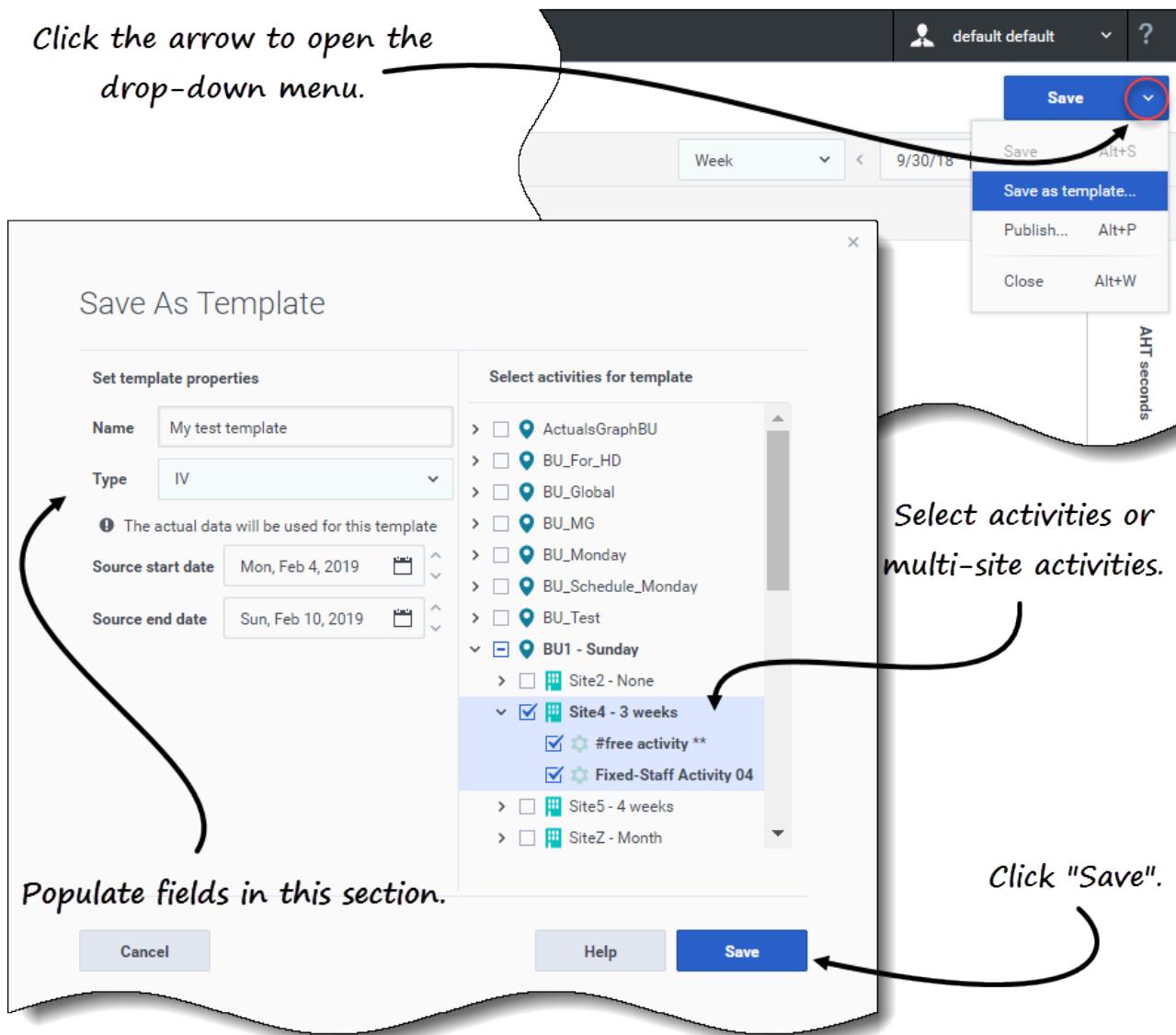
1. Open a scenario.

- 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

After adding comments, these indicators appear in the grid.

Select cell in the preferred date column.

Click to add comments.

Enter 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:

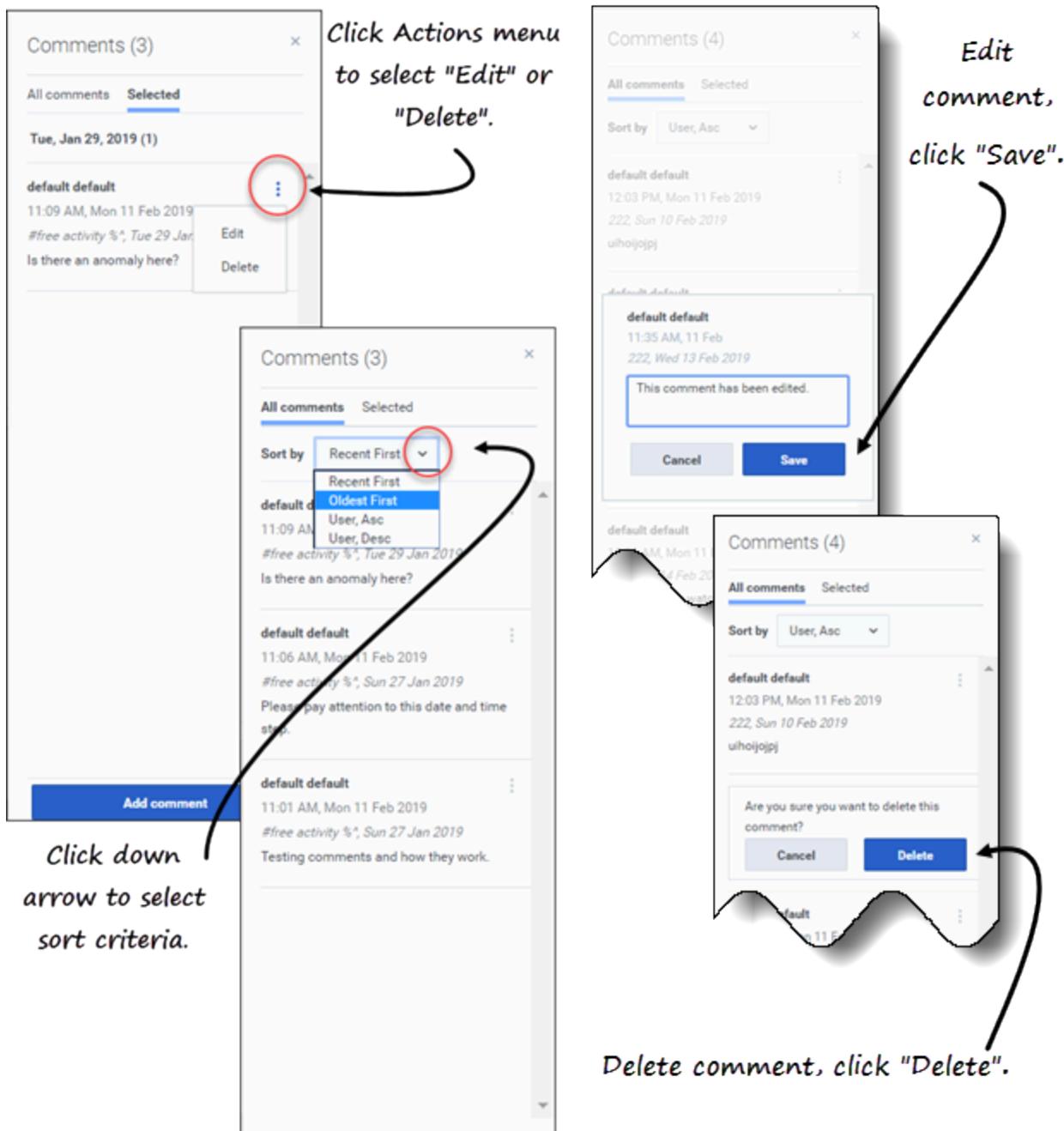
1. Click the triangle in the date cell.
The Selected tab opens, by default.
2. Select an activity and then, click **Comments** in the upper-right corner of the view.
The All comments tab opens, by default. If there are no comments for the selected activity, the No comments message displays.

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.

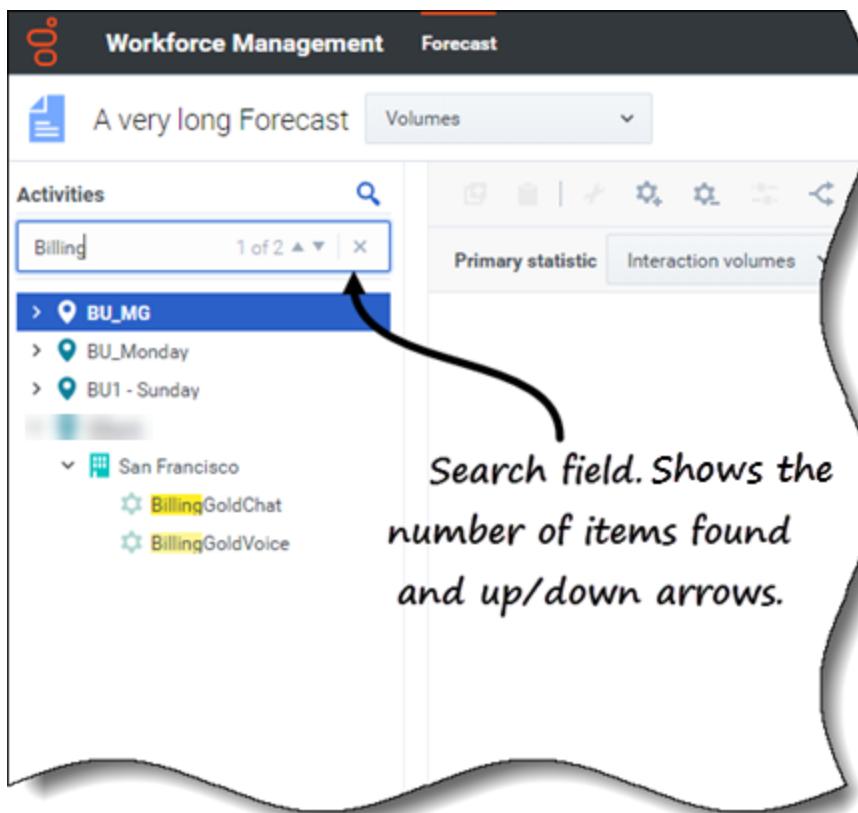
The **Sort by** field is visible only if there are two or more comments in the tab. Selecting **User, Asc** or **User, Desc** sorts comments by the user's name in ascending or descending order. **Recent First** is the default sort order.

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.