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Workforce Management Supervisor Help

Managing overlays and events

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Create and manage overlays and overlay events.

Related documentation:

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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

Apply to IV AHT

Spread over Days Hours 15 Minutes

Impact Forecast values and totals

- Always use the entered distribution
- Initial impact Ending impact
- Always calculate disregarding impacts and distribution
- Redistribute Forecast without changing total
- Always use the entered distribution
- Always calculate disregarding impacts and distribution

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".

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.

The screenshot displays the 'Forecast' application interface. On the left, under 'Overlays', a tree view shows a hierarchy of business units (BU_MG, BU_Monday, BU1 - Sunday, BU2 - Saturday, Site3 - 2 weeks, Site6 - 5 weeks, Site7 - 6 weeks, BU3 - empty sites, BU4 - empty, BU5, BU6 - Wednesday) with 'Site7 - 6 weeks' highlighted. The middle panel, titled 'Site7 - 6 weeks', contains a table of overlays:

Name	Type	Spread
Overlay [1]	Impacting	24 day(s)
test	Impacting	960 day(s)
test1234	Redistributing	1200 day(s)

The 'test' overlay is selected. The right panel shows the 'Properties' tab for this overlay. It includes a 'Name' field with 'test', a note 'This overlay is impacting forecast values and totals', a 'Spread over' field set to 960 with radio buttons for 'Days', 'Hours', and '15 Minutes' (Days is selected). Below this, there are radio buttons for 'Always use the entered distribution' (selected) and 'Always calculate disregarding impacts and distribution'. At the bottom, there is a 'This overlay is applicable to' section with radio buttons for 'IV' (selected) and 'AHT'. A 'Save' button is located at the bottom right of the right panel.

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.

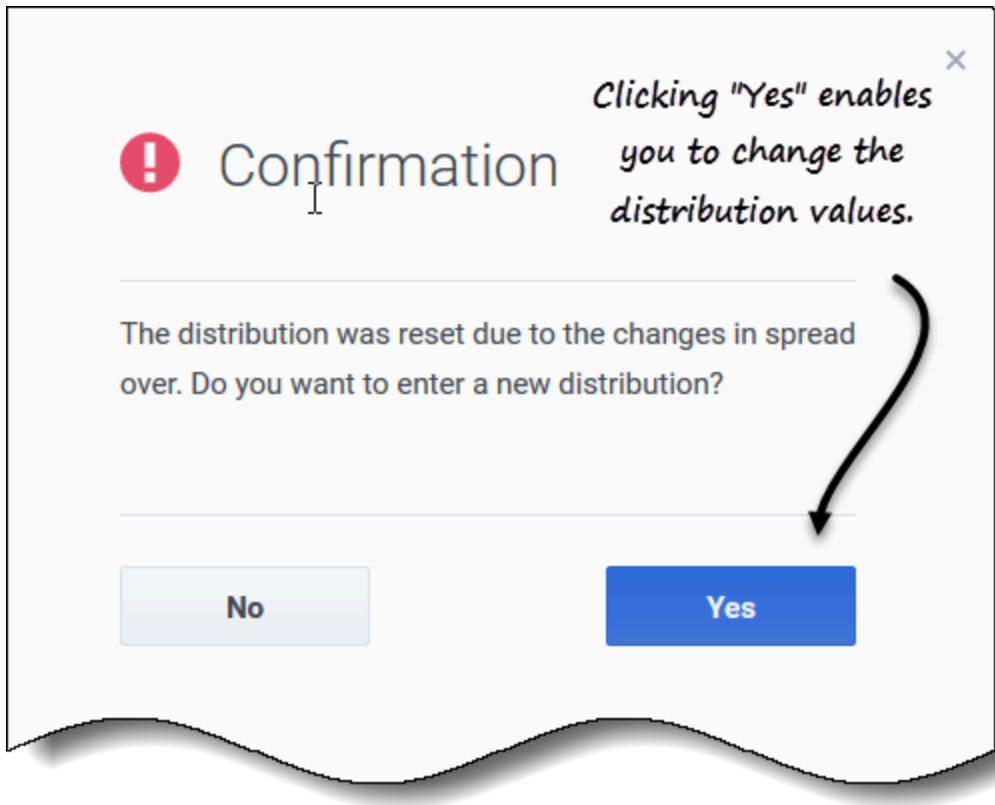
Tip

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  

<input type="checkbox"/>	Name	Type	Spread
<input type="checkbox"/>	Overlay [1]	Impacting	8 hour(s)
<input checked="" type="checkbox"/>	Overlay [2]	Redistributing	72 day(s)
<input checked="" type="checkbox"/>	Overlay [4]	Redistributing	48 day(s)
<input type="checkbox"/>	Overlay [5]	Redistributing	24 day(s)
<input type="checkbox"/>	Overlay [6]	Redistributing	24 day(s)
<input type="checkbox"/>	Overlay [7]	Impacting	24 day(s)


Delete

Click "Delete" to confirm or "Cancel" to cancel the action.

2 Delete Overlays

You are about to delete 2 overlays. This action cannot be undone. Do you want to proceed?


MG_Site1

New overlay 

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Overlay 5
<input checked="" type="checkbox"/>	Overlay 11
<input checked="" type="checkbox"/>	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.

Overlay [2]

Properties Distribution Impacted activities **Events**

Add event

Event	Start date	Start time	Strength	Disregard
Overlay Event [1]	4/26/18	12:00 AM	1	<input type="checkbox"/>

Click to add an event.

New Event

Set properties for new event

Event name

Impact start date

Impact start time

Strength Disregard historical data

Set the properties for the Event and then, click "Create".

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

Overlay [1]

Properties Distribution Impacted activities **Events**

Add event

Event	Start date	Start time	Strength	Disregard
Overlay Event [1]	4/19/18	12:00 AM	2	<input type="checkbox"/>

Click the Actions icon and select "Edit".

Edit Event

Set properties for event

Event name: Overlay Event [1]

Impact start date: Thu, 19 Apr 2018

Impact start time: 12:00 AM

Strength: 2

Disregard historical data:

Make the necessary changes and click "Save".

Cancel Help Save

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

Overlay [1]

Properties Distribution Impacted activities **Events**

Add event

Event		Start date	Start time	Strength	Disregard
Overlay Event [1]	⋮	4/19/18	12:00 AM	2	<input type="checkbox"/>

Edit
Delete

Click the Actions icon and select "Delete".

Delete Event

You are about to delete event 'Overlay Event [1]'. This action cannot be undone. Do you want to proceed?

Cancel Delete

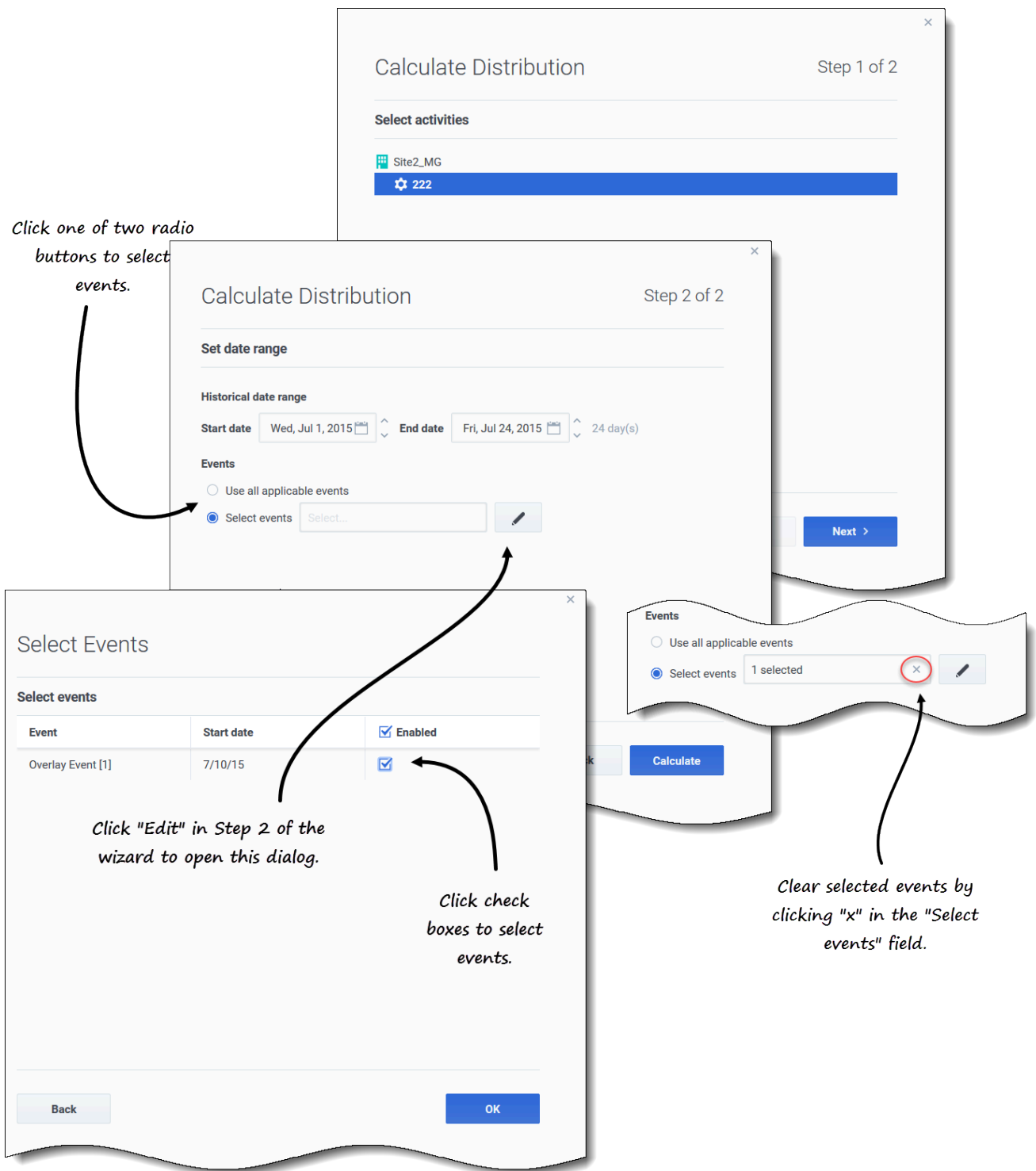
Confirm the deletion, click "Delete".

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.
- Ctrl+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.