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# Workforce Management Supervisor Help

Adjusting and splitting volumes

7/27/2024

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## Contents

- 1 Adjusting volumes within a date range
  - 1.1 Adjusting the scenario's volume
  - 1.2 Procedure continued...
- 2 Adjusting volumes within time steps
  - 2.1 Adjusting volume in time steps
- 3 Splitting Volumes
  - 3.1 Step 1: Selecting the date range and MSA
  - 3.2 Step 2: Selecting the Service time
  - 3.3 Step 3: Selecting activities within MS
  - 3.4 Step 4: Splitting parameters
- 4 More about the Split Volumes settings
  - 4.1 Use AHT forecast
  - 4.2 Service time type
  - 4.3 Service time
  - 4.4 Select activities within multi-site activities
  - 4.5 Split % and templates

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

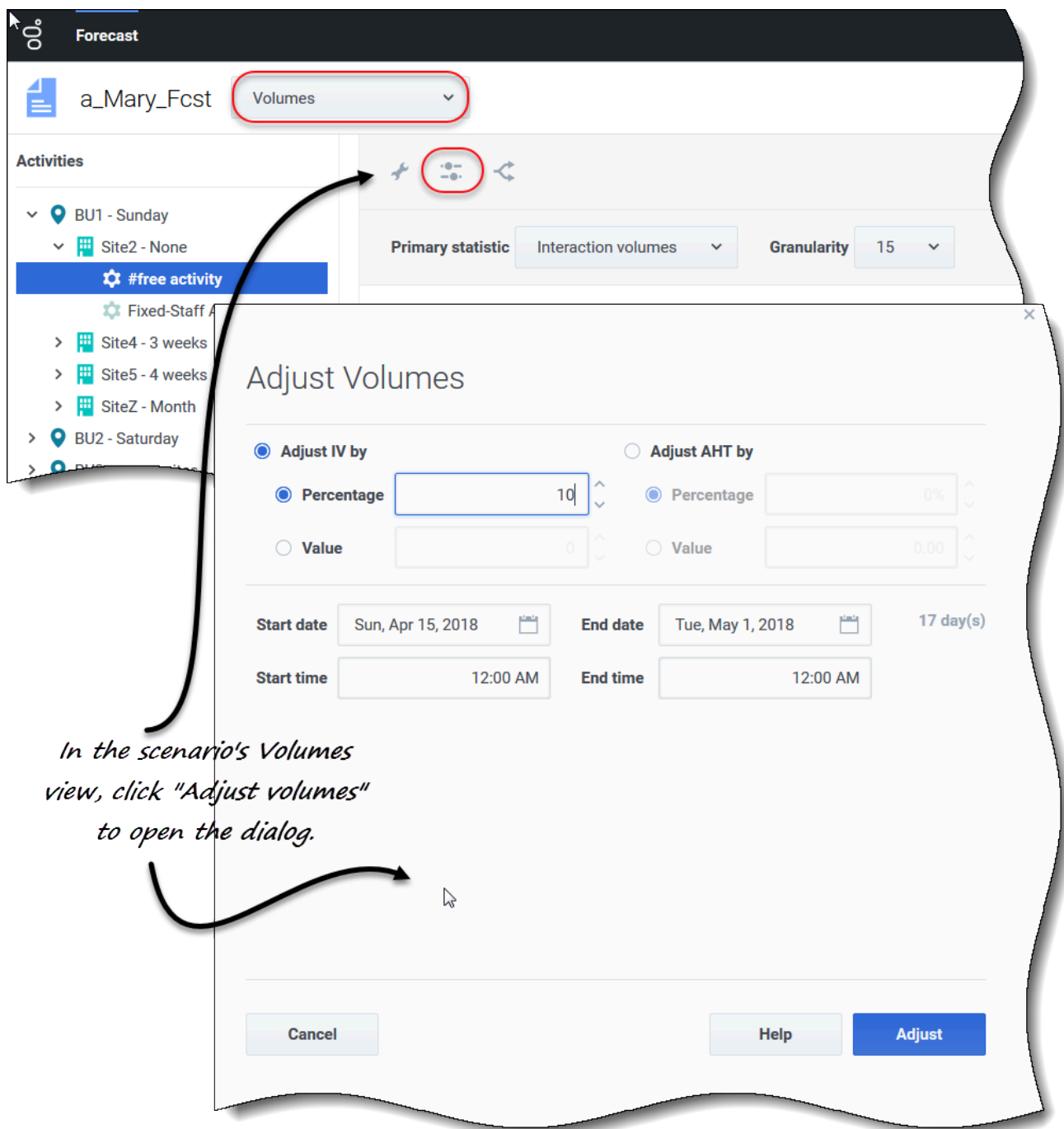
**Related documentation:**

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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**

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### 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.

The screenshot shows a software interface for managing volumes. At the top, there is a 'Save' button and a date range selector set to '7/29/18 to 8/4/18'. Below this is a table with columns for 'Time step', 'Interaction ...', 'Average Ha...', and 'Forecast #'. The table is filtered for 'Mon Aug 6'. A red circle highlights the cell for '12:30 AM' in the 'Forecast #' column, which contains the value '20'. An arrow points from this cell to a callout box labeled '1 Change values within timesteps.' Another arrow points from the 'Save' button to a callout box labeled '2 Click "Save".'. A third arrow points from the bottom-right corner of the interface to a callout box labeled '3 Confirmation message appears.', which shows a green checkmark and the text 'Changes saved successfully'.

Time step	Interaction ...	Average Ha...	Interaction ...	Average Ha...	Interaction ...
	Forecast #	Forecast #	Forecast #	Forecast #	Forecast #
Daily total	2400	300.00	2395	299.06	
12:00 AM	25	300.00	25	300.00	
12:15 AM	25	300.00	25	250.00	
12:30 AM	25	300.00	20	250.00	
12:45 AM	25	300.00	25	300.00	
1:00 AM	25	300.00	25	300.00	
1:15 AM	25	300.00	25	300.00	

## 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.

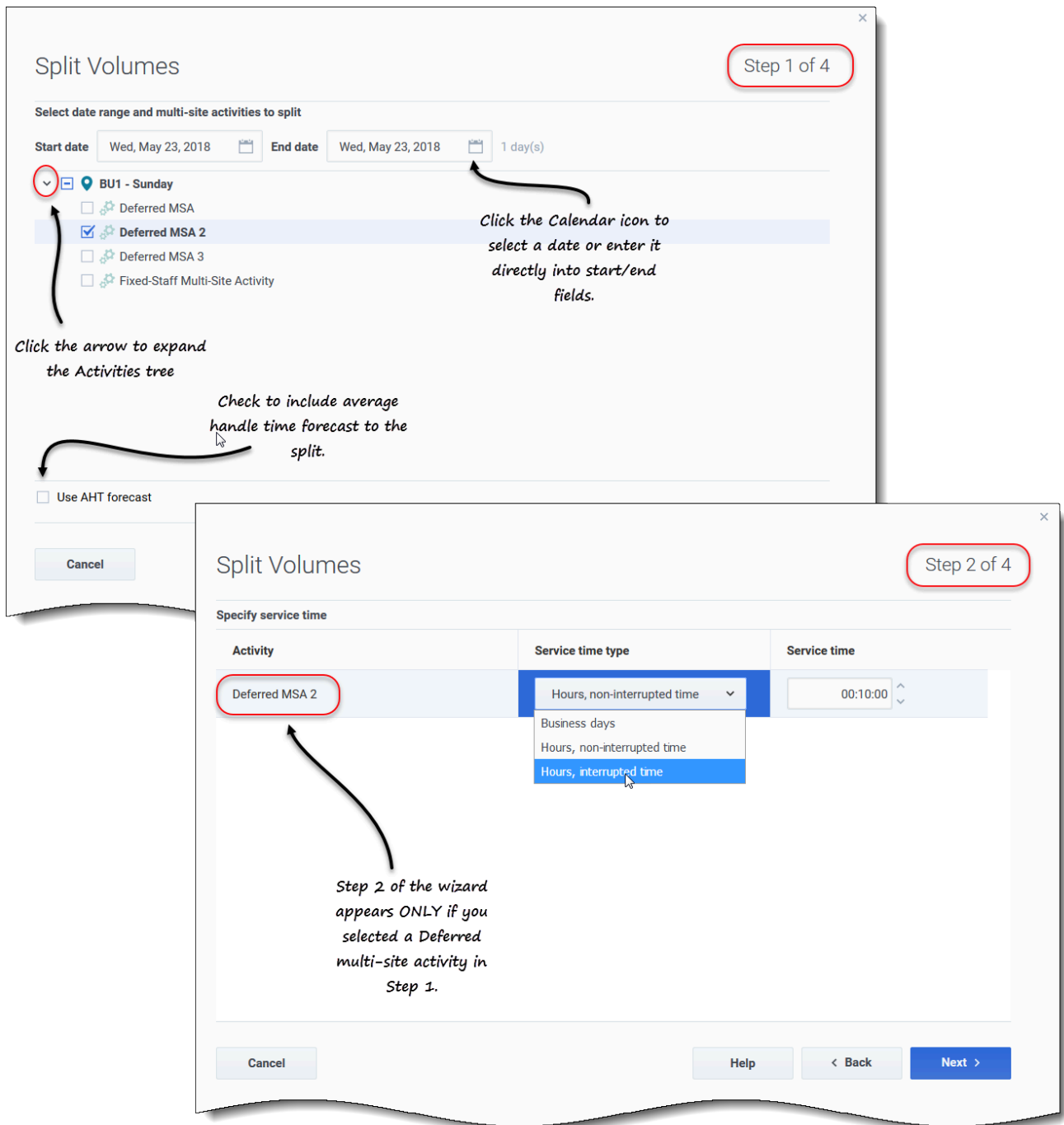
## Splitting Volumes

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.

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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

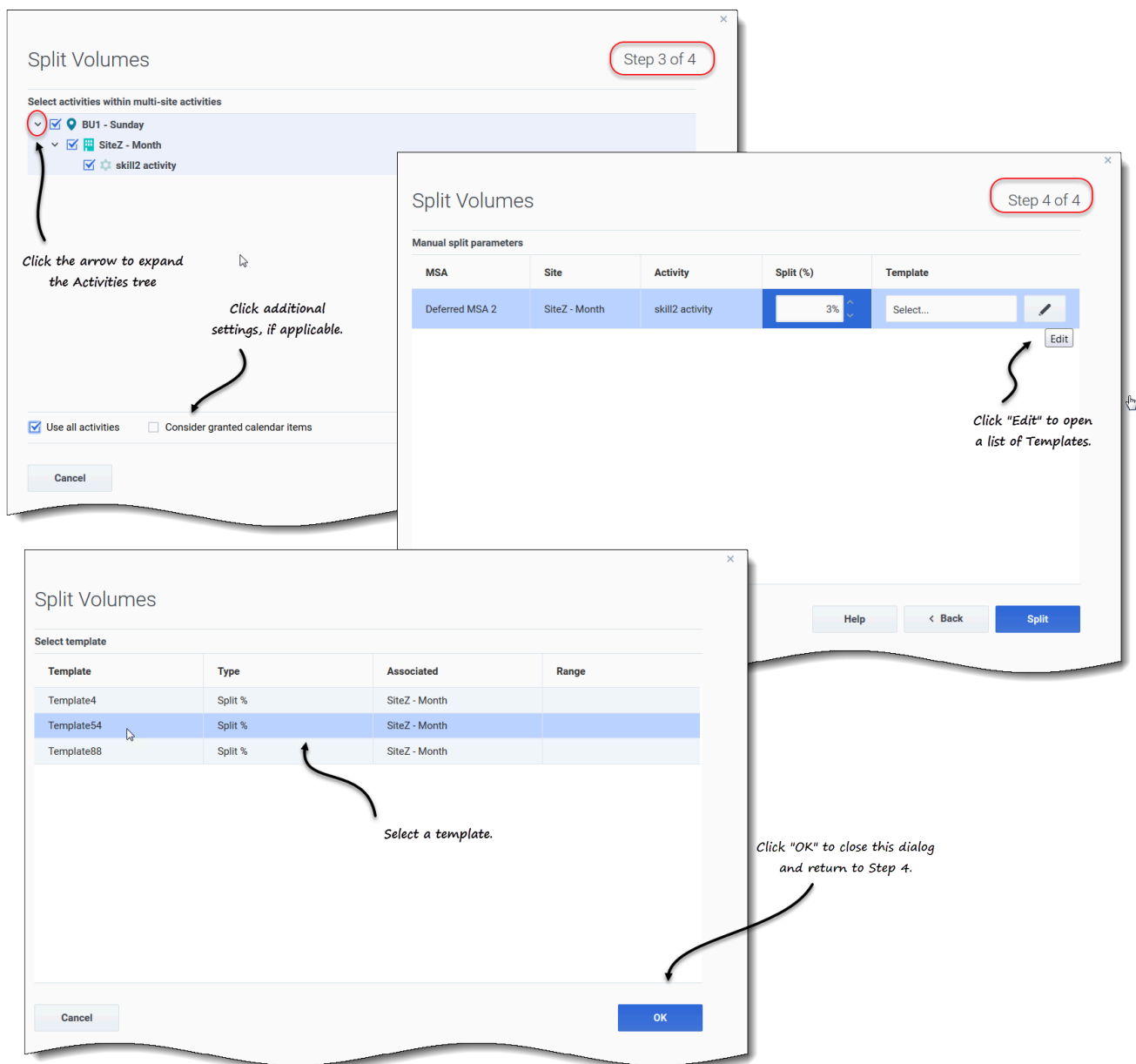
1. Enter a date range in the **Start date** and **End date** fields.



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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.

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## 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.

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## 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.