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Workforce Management Supervisor Help

Shrinkage in scenarios

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Shrinkage in scenarios

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 to the Volumes view by default.

Shrinkage in scenarios

1 Select a scenario and click "Open".

2 The scenario opens to the Volumes view.

3 Switch to the Shrinkage view.

The screenshot shows the 'Forecast Scenarios' list with scenarios like 'Forecast', 'IForecast', 'UHS', 'IShrinkage1year', 'IShrinkage1Month', and 'IShrinkage1Week'. The 'Volumes' view displays a graph of 'Interaction Volumes' over time (Sun Dec 9 to Sat Dec 15). The 'Shrinkage' view dropdown menu is also visible.

Time step	Sun Dec 9		Mon Dec 10		Tue Dec 11		Wed Dec 12		Thu Dec 13		Fri Dec 14		Sat Dec 15	
	Interaction V...	Average Han...	Interaction V...	Average Han...	Interaction V...	Average Han...	Interaction V...	Average Han...	Interaction V...	Average Han...	Interaction V...	Average Han...	Interaction V...	Average Han...
Daily total	7050	148.07	7962	153.21	9580	165.30	3760	155.38	3557	151.93	3973	148.49	1348	145.04
12:00 AM	73	148.00	83	153.00	100	165.00	39	155.00	37	152.00	41	149.00	14	145.00
12:15 AM	74	148.00	83	153.00	100	166.00	39	156.00	37	152.00	42	148.00	14	145.00
12:30 AM	73	148.00	83	153.00	99	165.00	39	155.00	37	152.00	41	149.00	14	145.00
12:45 AM	74	148.00	83	154.00	100	165.00	39	155.00	37	152.00	42	148.00	14	145.00
1:00 AM	73	148.00	83	153.00	100	166.00	40	156.00	37	152.00	41	149.00	14	145.00
1:15 AM	73	148.00	83	153.00	100	165.00	39	155.00	37	152.00	41	148.00	14	145.00
1:30 AM	74	148.00	83	153.00	100	165.00	39	156.00	37	152.00	42	149.00	14	145.00
1:45 AM	73	149.00	83	154.00	99	166.00	39	155.00	38	151.00	41	148.00	14	145.00
2:00 AM	74	148.00	83	153.00	100	165.00	39	155.00	37	152.00	42	149.00	14	145.00
2:15 AM	73	148.00	83	153.00	100	165.00	39	156.00	37	152.00	41	148.00	14	145.00

To open 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.

Link to video

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:

Choose shrinkage type or SSG for activity.


Choose period.

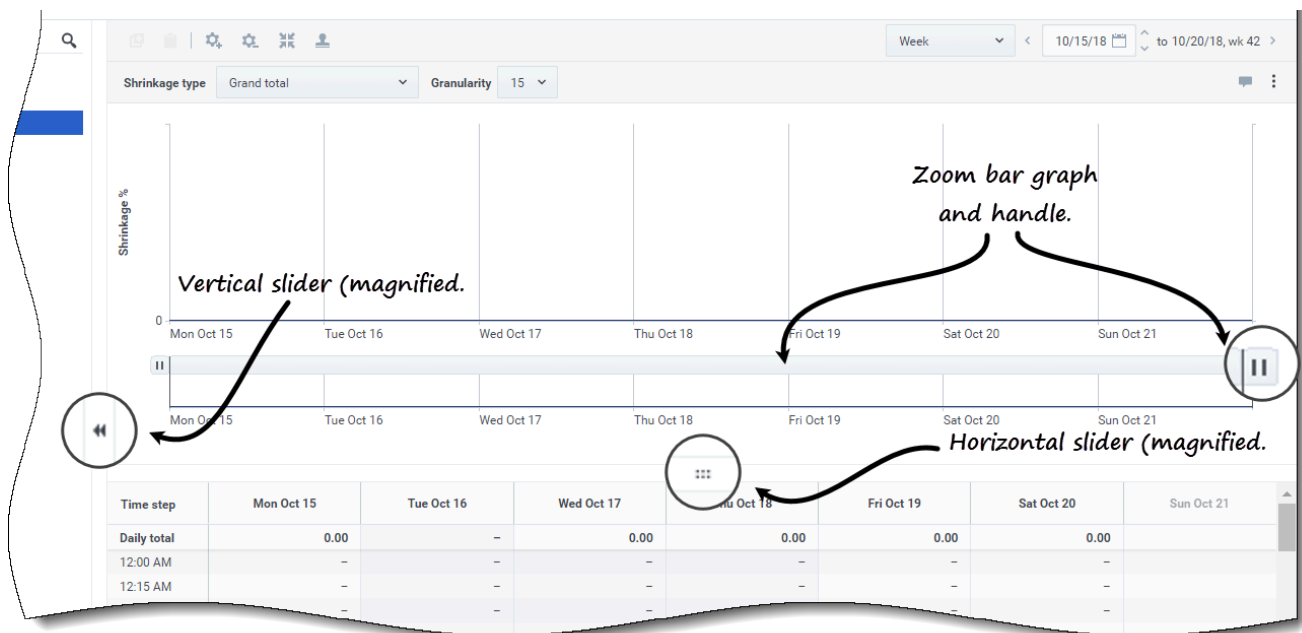
Show/hide graph.

Choose granularity.

- **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 in the list. If you select a multi-site activity that has a child activity that is associated with a SSG, Schedule State Group<activity name> 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 **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<activity name>**).

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

WFM enables you to edit forecast shrinkage data in the **Scenario > Shrinkage** grid:

- Enable editing in the grid by selecting an activity.
- Edit a multi-site activity by selecting and editing one of its child activities. (You cannot edit a multi-site activity directly.)
- Edit time steps and daily totals by selecting the period **Week**
- Edit weekly and daily totals by select the period **Month** or **Year**.

If you select **Grand total**, **Total planned**, or **Total unplanned**, editing values in the grid is disabled.

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%.

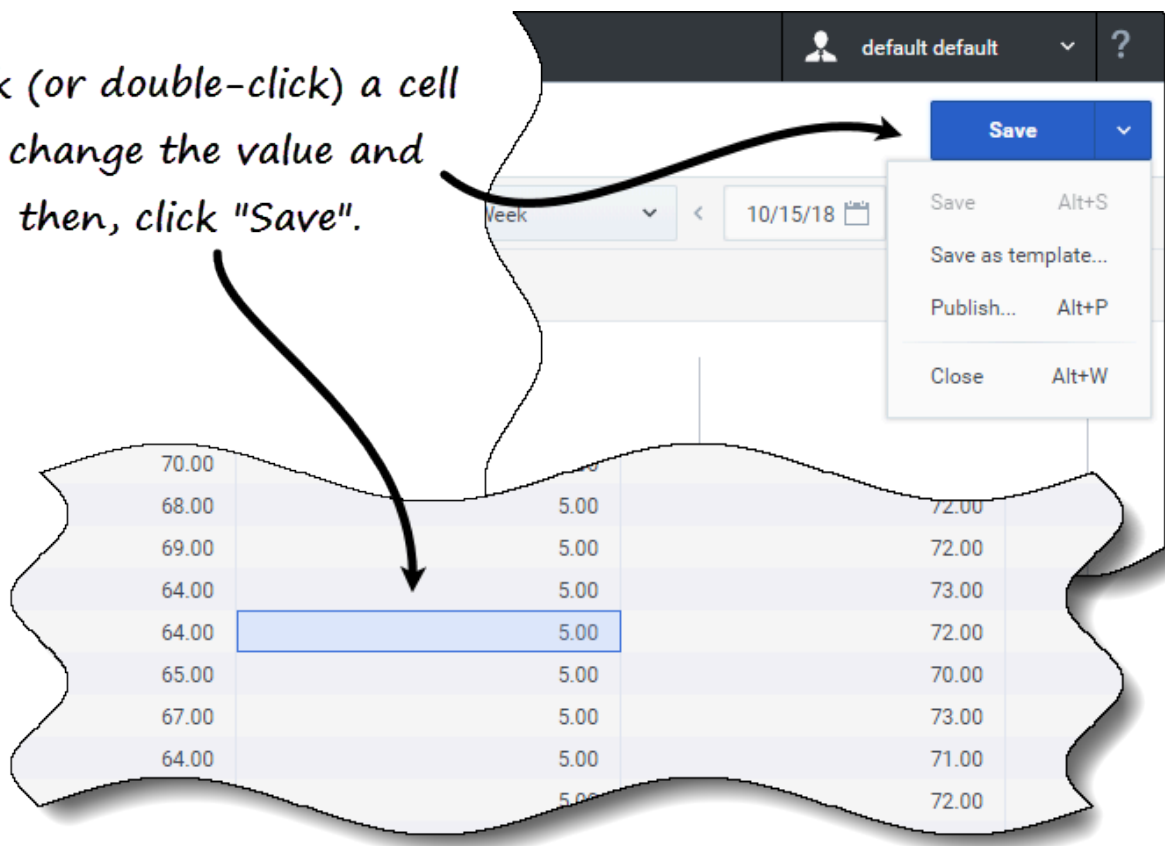
Navigating the grid

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.

Click (or double-click) a cell to change the value and then, click "Save".



To edit 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.

If you switch to another view without saving the changes, a dialog opens with the message *Would you like to save changes to <scenario name>.* 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 **Shrinkage** 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. See the [Workforce Management Administrator's Guide](#).

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.

Select and copy values.

Select target cells.

Paste values to target cells.

Time step	Mon Oct 1	Tue Oct 2	Wed Oct 3
Daily total	10.92	11.00	
12:00 AM	11.00	11.00	
12:15 AM	11.00	11.00	
12:30 AM	11.00	11.00	
12:45 AM	11.00	11.00	
1:00 AM	9.00	11.00	
1:15 AM	9.00	11.00	
1:30 AM	9.00	11.00	
1:45 AM	9.00	11.00	
2:00 AM	11.00	11.00	
2:15 AM	11.00	11.00	
2:30 AM	11.00	11.00	

To copy and paste 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.
	Paste	Pastes data from the clipboard to the selected area in the grid.

Icon	Name	Description
	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.