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Workforce Management Supervisor Help

Managing overlays and events

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Contents

- 1 Managing overlays and events
 - 1.1 Creating overlays
 - 1.2 Editing overlays
 - 1.3 Deleting overlays
 - 1.4 Adding overlay events
 - 1.5 Editing events
 - 1.6 Deleting events
 - 1.7 Calculating distribution in overlays
 - 1.8 Selecting data to copy and paste

Managing overlays and events

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

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
- ☒ skill12 activity
- ☒ WS activity

Choose one or more activities and then, click "Create".

Cancel Help < Back **Create**

To create 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**.
The default is 1 and acceptable values are between 1 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**
7. 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**.
8. Click **Next**.
9. In the **Select activities** dialog, expand the business units or sites to select activities and/or multi-site activities for this overlay.
10. Click **Create**.
11. 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.

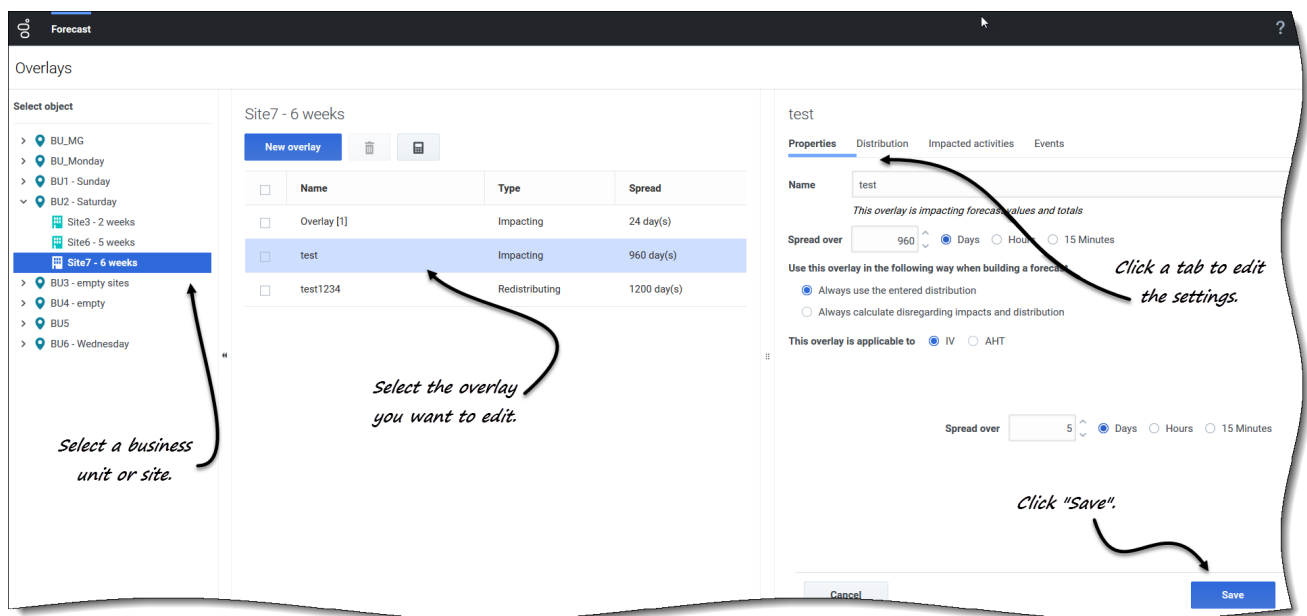
- If you enter different values in the impact fields and spread over is 1, a validation message appears.
- If you enter the values in both impact fields and spread over is 2, WFM creates the distribution with the specified values.
- If you enter the values in both impact fields and spread over is greater 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 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 **Average** or **Total** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.



To edit an overlay:

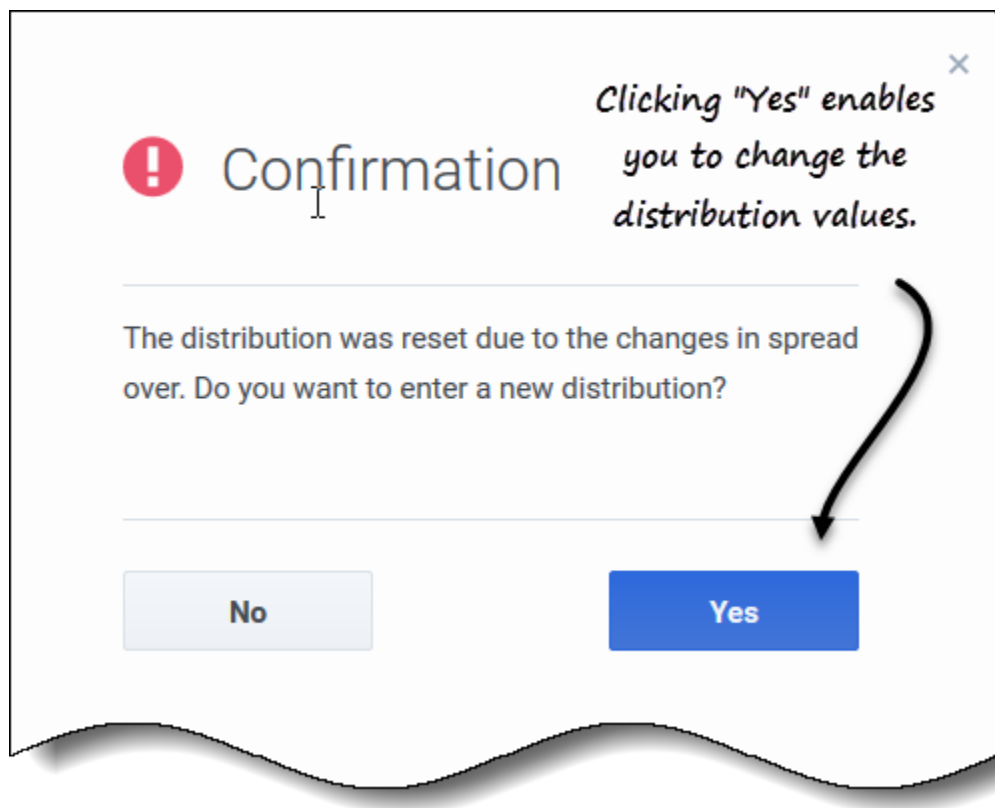
1. In the **Forecast > Overlays** view, select a business unit or site.
The overlays for this object are displayed in a table.
2. In the **Overlays** table, select the overlay you want to edit.
The Data pane opens, displaying four tabs.
3. Click a tab to change its settings.
4. Edit one or more of the 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 this message in a **Confirmation** dialog *The distribution was reset due to the changes in spread over. Do you want to enter a new distribution?*

If you want to change 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

1 Select overlays and click "Delete".

Site4 - 3 weeks

New overlay  

☐	Name	Type	Spread
☐	Overlay [1]	Impacting	8 hour(s)
☒	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)

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 

☒	Name
☒	Overlay 5
☒	Overlay 11
☒	Overlay [6]

Select to delete all overlays in the table.

To delete 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.

To delete multiple overlays at once:

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

To delete 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 the procedure above.

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

This Help mentions three types of events, which are described in [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	☐

Click to add an event.

New Event

Set properties for new event

Event name: Overlay Event [2]

Impact start date: Sat, 19 May 2018

Impact start time: 12:00 AM

☒ Strength: 1 ☐ Disregard historical data

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

Cancel Help **Create**

To add 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

The screenshot shows the 'Overlay [1]' interface with the 'Events' tab selected. A table lists events, and an 'Edit' button is highlighted in the context menu. An arrow points from the 'Edit' button to the 'Edit Event' dialog box. Another arrow points from the 'Edit Event' dialog box to the 'Save' button.

Click the Actions icon and select "Edit".

Make the necessary changes and click "Save".

Event	Start date	Start time	Strength	Disregard
Overlay Event [1]	4/19/18	12:00 AM	2	☐

Event name: Overlay Event [1]

Impact start date: Thu, 19 Apr 2018

Impact start time: 12:00 AM

☒ Strength: 2 ☐ Disregard historical data

Cancel Help Save

To edit 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	☐

Click the Actions icon and select "Delete".

Confirm the deletion, click "Delete".

Delete Event

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

Cancel **Delete**

To delete 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 the **Always use the entered distribution** setting is selected in the overlay's properties. See [Creating overlays](#).

Calculate Distribution Step 1 of 2

Select activities

Site2_MG

222

Calculate Distribution Step 2 of 2

Set date range

Historical date range

Start date Wed, Jul 1, 2015 End date Fri, Jul 24, 2015 24 day(s)

Events

☐ Use all applicable events

☒ Select events Select...

Next >

Select Events

Select events

Event	Start date	Enabled
Overlay Event [1]	7/10/15	☒

Back OK

Events

☐ Use all applicable events

☒ Select events 1 selected x

Calculate

Click one of two radio buttons to select events.

Click "Edit" in Step 2 of the wizard to open this dialog.

Click check boxes to select events.

Clear selected events by clicking "x" in the "Select events" field.

To calculate 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.

5. 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.

6. 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.

7. 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 your environment is using HTTPS secure connections to WFM. See the *Workforce Management Administrator's Guide*.

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.