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Workforce Management Supervisor Help

Managing shrinkage data

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Managing shrinkage data

In Workforce Management (WFM) you'll manage the shrinkage data (previously named *overheads*) in Forecast Scenarios, by adding, editing and deleting shrinkage associated with the Schedule State Group (SSG) for a specific activity. You can also **apply templates** to make adjustments to the shrinkage data.

Multi-site activities (MSA) use shrinkage information that is associated with Schedule State Groups from child activities.

Statistics appear in the **Shrinkage type** drop-down menu for the item that is selected in the **Objects** pane. If the item is an activity, then the menu lists all Schedule State Group shrinkage that is associated with the activity. If the item is a multi-site activity, the menu lists shrinkage for all Schedule State Groups that are associated with the child activities. You must edit the shrinkage values for child activities of the MSA individually.

If you select an activity or MSA for which there are no available Schedule State Groups, after clicking **Add Shrinkage**, you'll see the message *There are no available schedule state groups* in the dialog.

Adding and deleting shrinkage

Adding shrinkage in forecast scenarios means adding shrinkage values that are associated with a Schedule State Group (SSG) and a target, such as an activity. Deleting shrinkage means deleting these values in the **Shrinkage type** menu. Once you confirm the deletion of these values, the SSG is removed from the **Shrinkage type** menu. Use the procedures below to add and delete shrinkage.

Adding shrinkage to activities

Select a Schedule State Group from the list.

Add Shrinkage For New Deferred Activity

Select available schedule state group

Name	Type
break	Unplanned shrinkage
coffee-break	Unplanned shrinkage
meal	Planned shrinkage
planned	Planned shrinkage
unplanned	Unplanned shrinkage

☒ Initial value

☐ Select templates

Select Templates

Add or remove templates

☒ Z1 Test 1254

Start date End date 20 day(s)

☒ Sun ☒ Mon ☐ Tue ☐ Wed ☒ Thu ☒ Fri ☒ Sat

Enter initial value or select template.

To add shrinkage to an activity in a scenario:

1. Open the Shrinkage view
2. In the **Objects** pane, expand business units and sites to select an activity.

3. In the toolbar, click **Add shrinkage** .
The Add Shrinkage for <Activity_name> dialog opens.

4. Select a Schedule State Group from the list.

5. Choose one of these options:

- In the **Initial value** field, enter a percentage.

- Click the **Select templates** radio button and click **Edit** .
The Select Templates dialog opens.

1. Select a template from the drop-down list.
2. Enter (or use the date selectors to adjust) the **Start date** and **End date**, if necessary.
3. Uncheck any days of the week that are not applicable for this template.
4. To add more templates, click **Add template**, repeating substeps 2 and 3 for each one.
5. Click **OK**.

The wizard returns to the Add Shrinkage for <Activity_name> dialog.

6. Click **Add**.
WFM confirms that the shrinkage was successfully added, and the shrinkage appears in the graph and grid.

Click **Cancel** or **X** in the upper-right corner of the dialog to cancel the action and close the dialog.

Deleting shrinkage from activities

The screenshot shows the !ShrinkageRoma application interface. On the left, the 'Activities' pane lists various business units and sites, with 'New Deferred Activity' highlighted. The main area displays a 'Shrinkage type' dropdown menu with options: Grand total, Total planned, Total unplanned, planned (selected), and unplanned. A red box highlights the 'Delete...' button next to the 'planned' option. A handwritten note says 'Select shrinkage in the drop-down menu.' with an arrow pointing to the 'planned' option. Below the main area, a 'Delete Shrinkage' dialog box is open, asking 'Are you sure you want to delete shrinkage planned (New Deferred Activity)?'. It has 'Cancel' and 'Delete' buttons. A handwritten note says 'Click "Delete" in the confirmation dialog.' with an arrow pointing to the 'Delete' button.

To delete shrinkage from an activity in a scenario:

1. Open the **Shrinkage** view
2. In the **Objects** pane, expand business units and sites to select an activity.
3. Click the **Shrinkage type** drop-down menu and select the Schedule State Group you want to delete.
4. In the selected SSG's submenu, click **Delete**.
5. A confirmation dialog opens.

Click Delete.

The shrinkage is deleted from the graph and grid for the selected activity.

6. Alternatively, click **Cancel** to cancel the action and close the dialog.

Adding shrinkage by applying templates

Add more templates, if necessary.

Apply Templates

Add or remove templates

Start date Sun, Sep 16, 2018 **End date** Fri, Oct 5, 2018 20 day(s)

☒ Mon ☒ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

Start date Sun, Sep 16, 2018 **End date** Fri, Oct 5, 2018 20 day(s)

☐ Mon ☐ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Click the down arrow to select template.

To add shrinkage to Schedule State Group by applying a template:

1. Open the **Scenario > Shrinkage** view
2. Click the **Shrinkage type** drop-down list to select a Schedule State Group.
3. Click **Apply templates** .
The Apply Templates dialog opens.
4. In the **Select template** field, select the template you want to apply.
5. Change the start and end date, if necessary.
Ensure the dates are not outside of the scenario start/end dates.
6. Uncheck any days of the week that you do not want impacted by this template.
7. To add more templates, click **Add template**, repeating steps 4 to 6 for each one.
8. Click **Apply**.
9. When the process is complete, click **OK**.

Click **Cancel** or **X** in the upper-right corner of the dialog to cancel the action and close the dialog.