GENESYS™

Workforce Management Web for Supervisors Help

Overlays

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Contents

Overlays

> **Tip**
>
> Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Overlays" page in the *Workforce Management Supervisor Help*, which describes the new Forecast module.

You can create and configure overlays in the **Forecast** module of WFM Web for Supervisors. Overlays perform the function of factors, and help you track events that might affect interaction volume. For example, use an overlay to include in your forecast the anticipated effect of a sales promotion or a marketing campaign.

See also Overlays Primer.

Getting Started

Prerequisite: You must have the security permission **Overlays** before you can create or configure overlays or access the action **Find Events** in the **Historical Data Volumes View**. It is assignable in **Configuration > Roles > Role Privileges > Forecast Role Privileges**.

To use overlays, open the **Forecast** module in the **Modules** pane and select **Overlays**. You can then see a hierarchy of business units (BUs), sites and overlays on the **Object** pane below.

To manage the list of **Overlays**, select a BU or a site in the **Objects** pane.

To edit an overlay, select it in the **Objects** pane and make changes in the **Data** pane.

Managing the List of Overlays

You can use toolbar icons or Actions menu commands to manage the overlays:

1. Select a **BU** or **Site** on the **Object** pane.
   A table in the Data pane lists all current overlays.

2. Click an overlay to select its entire row.

3. Select a command from the **Actions** menu, or an icon from the toolbar:

Toolbar controls

Icon	Name	Description
	New	Start the New Overlay wizard.
	Edit	Edit the selected overlay.
	Delete	Delete the selected overlay.

Data Pane Controls

The grid displays all overlays that belong to the selected BU or Site. The grid contains these columns:

Overlay	Name of the selected overlay.
Spread	The time period over which the overlay is spread; in days or hours.
Type	Possible values (Impacting or Redistributing) indicate how the selected overlay will affect forecast values. You can change this in the Properties tab by selecting a type: • **Calculate Using Specified Initial** and **Ending Impact** (select to specify Impacting) • **Always Use Entered Distribution** or **Always Calculate Disregarding Impacts and Distribution** (to specify Redistributing)
Usage	For each overlay, this column lists the **Properties** tab choice for type (see above).

Editing an Overlay

To edit an overlay:

1. Select **Overlay** in the module pane.

2. Select a **BU** or **Site** in the object area.

3. Select an overlay by one of these methods:

   • Select an overlay in the object area in the object area (beneath the selected **BU** or **Site**).

   • Select an overlay in the data area and click **Edit** .

   • Double-click an overlay in the data area.

4. Select a command from the **Actions** menu, or an icon from the toolbar:

   • Edit **Overlay** controls:

Icon	Name	Description
	Save	Save all changes made to overlay.
	Calculate distribution	Start the Calculate Distribution Wizard, which calculates the distribution of the selected overlay. This action is enabled only if the option Always Use Entered Distribution is selected.

— **OR** —

- Select a tab:

Properties *tab*	View and change the main properties of the selected overlay.
Distribution *tab*	View and change the distribution method of the selected overlay. Enabled in the Properties tab by selecting the type Always Use Entered Distribution.
Impacted Activities *tab*	View and change activities which are impacted by the selected overlay.
Events *tab*	View and change events which are related to the selected overlay.

Properties Tab Elements

Name *field*	You can edit the selected **Overlay's** name in this field.
This overlay is *label*	• **Impacting Forecast Values and Totals**—Specify that this overlay can impact the forecast by changing forecast's values and totals. This option is the default. • **Redistributing Forecast Without Changing Total**—Specify that this overlay must preserve a forecast's total for specific period even while changing the distribution of values inside that period.
Spread Over *field*	Displays the length of time that the selected **Overlay** will occupy. Edit this field and select one of the two radio buttons **Days** or **Hours** to choose the units. The value must be greater than 0 (zero) and the default is set during creation.
While building forecast use this overlay in the following way *radio button group*	• **Calculate Using Specified Initial and**

	Ending Impact—Use the specified initial and ending impact when building a forecast. This option enables the Distribution tab and the fields Initial Impact and Ending Impact beneath that tab. • **Always Use Entered Distribution**—Use the specified (entered) distribution when building a forecast. This option enables the Distribution tab. • **Always Calculate Disregarding Impacts and Distribution**—Use this overlay, but always disregard impacts and distribution when building a forecast. This option disables the Distribution tab.
This overlay is applicable to *radio button group*	• **IV**—Specify that this overlay applies only to Interaction Volume (IV). • **AHT**—Specify that this overlay applies only to Average Handling Time (AHT).

Distribution Tab Elements

What you see depends upon choices that you made on the **Properties** page.

- This page is completely disabled if **Always Calculate Disregarding Impacts and Distribution** was selected under the **Properties** tab.
- If **Always Use Entered Distribution** was selected on the **Properties** tab:
  - **Graph**—Displays the same information as the grid below it displays, but in graphical form.
  - **Grid**—Displays and allows you to edit the overlay's distribution. Columns:
    - **Daily** or **Hourly Impact**—Each row displays an increment during which the overlay will be in effect. The actual increment (day or hour) is configured in **Spread**.
    - **Distribution Value**—Displays the distribution value of each increment. The default value in each cell is 0.
    - If the selected overlay is of the type **impacting**, then you can enter values from -100 to 9999 into the grid.
    - If the selected overlay is of the type **redistributing**, then you can enter values from 0 to 100 into the grid.

> ### Important
> If the total of all values in the grid does not equal **100**, you will see a warning and will not be able to save your changes to the overlay.

- If **Calculate Using The Specified Initial and Ending Impact** was selected on the **Properties** page:

  - **Initial Impact** *field*—Use this field to specify the initial impact of the overlay. Range: 0 (the default) or any positive, negative, or fractional values.

  - **Ending Impact** *field*—Use this field to specify the ending impact of the overlay. Range: 0 (the default) or any positive, negative, or fractional values.

Impacted Activities Tab

(Also a page in the New Overlay wizard.)

This tab lists all activities that correspond to the **Factor** that is selected in the **Object** tree.

- Select the check box to the left of each activity in the list, to specify which activities will be impacted by the selected factor.

- Clear the check box to specify no impact.

Events Tab Elements

The grid on this tab lists all **Events** in the selected **Overlay**, one per row. The value in every cell of this grid is editable. The columns are:

Name	Edit the **Event** name in this cell.
Start Date	Edit the start date.
Start Time	Edit the start time.
Strength	Edit the strength of the event. The range is any positive value (greater than zero), up to nine digits and two decimals.
Disregard Historical Data	Select this check box if the event should disregard historical data. Clear the check box to consider historical data.

Events Controls

Add Event	Click to add a new row to the grid, with default values in the cells.
Delete Event	Click to delete the selected event from the grid.
Cancel or **Save**	Click to perform those functions.