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Genesys Engage cloud Workforce Management 8.5.1 Guide

New Forecast Template Dialog Box

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Important

This content may not be the latest Genesys Engage cloud content. To find the latest content, go to [Workforce Management in Genesys Engage cloud](#).

Use the **New Forecast Template** dialog box to create a new template.

1. Click the **New** button on the [Forecast Templates List view](#) toolbar, to display the **New Forecast Template** dialog box.
2. Enter a **Name** for the new template.
3. Use the **Associated** drop-down list to select the site for which you are building this template.
4. Select the template type from the **Type** drop-down list.
See below for a list of template types.
5. If you want to use settings from a previously configured template, select that template from the **Based On** drop-down list.
6. Enter a number in the **Initial Value** text box.

Tip

The initial value is a minimum value that applies to all timesteps. After you have created the template, edit it to adjust the precise values for each timestep. See [Template Properties: Data](#) for details. WFM Web interprets the **Initial Value** setting differently, depending on the type of template. For example, if you are creating an **Interaction Volume** template, the initial value might be 8 (calls per timestep).

7. If you are creating an overlap template, enter the **Start** and **End dates**.
8. Select the **Activities** that you want to be associated with this template.
Selecting activities enables you to control which templates are used when forecasting for specific activities.
9. Click **OK**.
Your new forecast template is now available in the [Forecast Templates List view](#).

Forecast Template Types

- **Interaction Volume**—Number of interactions per timestep.

Important

When you save historical IV or AHT for a multi-site activity as a template, only multi-site activity data are saved, never the sum of underlying activities.

- **Average Handle Time**—In seconds. See note above.
- **Service Level Percentage**—As a percentage. See [Special Note](#) at end of this topic.
- **Overheads**—As a percentage. See [Special Note](#).
- **Indirectly Occupied Time**—As a percentage. See [Special Note](#).
- **Maximum Occupancy**—As a percentage.
- **Interaction Volume Overlap**—Number of interactions per timestep.
- **Average Handle Time Overlap**—In seconds.
- **Staffing**—Number of agents (full-time equivalents) to be scheduled for each timestep. This can be either calculated by WFM (**Calculated Staffing**) or set by the user (**Required Staffing**), or you can use both **Calculated** and **Required** values in a forecast. See [Special Note](#).
- **Average Speed of Answer**—In seconds. See [Special Note](#).

Special Note

You can create these templates at the business unit level and apply them when building a multi-site activity staffing forecast.