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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**.
- 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.



- 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.