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Genesys Engage cloud Workforce Management 8.5.1 Guide

Publish/Extract Forecasts

Publish/Extract Forecasts

Important

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Use the **Publish Forecast Wizard** to transfer unpublished **forecast scenarios** to the Workforce Management database's **Master Forecast**, or to extract Master Forecast information to forecast scenarios.

The following sections cover:

- **Publishing** to the Workforce Management Database.
- **Extracting** from the Workforce Management Database.

Why Publish Forecasts?

- Publishing a forecast to the Workforce Management database means that the forecast is final. Schedules for a particular date range are based on the published (**Master**) forecast for those dates.
- Until a forecast is published, you cannot calculate certain performance data.

Publishing to the Workforce Management Database

To publish a forecast:

1. In the **Forecast Scenarios** view's **Scenarios Table**, select the scenario that you want to publish. Then click the **Publish** button on the toolbar.
The **Publish Forecast Wizard's Select Action** screen appears.
2. Select **Publish to Master Forecast**, and then click **Next**.
The **Publish to Master Forecast** screen appears.
3. In the **Source Dates** section, select the **Start date** and **End date**.
These fields define what date range of information you want to publish information from the selected scenario.

Tip

By default, the selected scenario's own start and end dates appear in these text boxes. Use the **date-selection controls** to adjust the dates. You cannot select dates outside the original scenario dates. The scenario and target start dates occur on the same day of the week.

4. In the **Target Dates** section, select the **Start date** and **End date**.
These values define the date range for which you want to update information in the **Master Forecast**.

Tip

By default, these fields' entries match those in the **Source Dates** section. Use the **date-selection controls** to adjust the dates. Data from a specific weekday is copied only to the same weekday. That is, forecast information for a **Monday** is copied to one or more **Mondays**, depending on the target date range that you select. The **Monday** data is not copied to every day within the target date range.

5. In the **Activities** list, select which activities you want to publish to the **Master Forecast**.
The tree shows all activities for which the selected scenario contains data.

Tip

You can expand business units to display their sites and expand sites to display their activities. You can select multiple activities from different sites.

6. Click **Finish**.

Extracting a Forecast from the Workforce Management Database

To transfer data from the **Master Forecast** into a forecast scenario:

1. In the **Forecast Scenarios** view's **Scenarios Table**, select the scenario to which you want to extract the data. Then click the **Publish** button on the toolbar.
The **Publish Forecast Wizard's Select Action** screen appears.
2. Select **Extract from Master Forecast**, and then click **Next**.
The **Extract from Master Forecast** window appears.
3. In the **Source Dates** section, select the **Start date** and **End date**.
These values define the date range for which you want to extract information from the **Master Forecast**.

Tip

By default, these values match those in the **Target Dates** section. Use the **date-selection controls** to adjust the dates.

4. In the **Target Dates** section, select the **Start date** and **End date**. These values define the date range for which you want to update the information in the selected target scenario.

Tip

By default, the scenario's own start and end dates appear in the text boxes. Use the **date-selection controls** to adjust the dates. For an existing scenario, you cannot select dates outside the scenario's original date range.

5. In the **Activities** list, select which activities you want to extract to the target scenario. The tree shows all activities for which the **Master Forecast** scenario contains data.

Tip

You can expand business units to display their sites and you can expand sites to display their activities. You can select multiple activities from different sites.

6. Click **Finish**.