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Genesys Engage cloud Workforce Management 8.5.1 Guide

Save as 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 **Save As Template** dialog box to create a new forecast template from existing data. You can open this dialog box from:

- [Historical Data Volumes View](#)
- [Master Forecast Staffing View](#)
- [Scenario Staffing View](#)

To complete the dialog box:

1. Enter a name for the new template into the **Name** field.
2. Select the site to which you want this template associated from the **Associated** drop-down list.
3. Select the template type from the **Type** drop-down list.
The **Based on** drop-down list and the **Initial Value** text box are disabled. You cannot alter their default entries.
4. [Select](#) or enter the **Start date** and **End date** into the corresponding fields in the **Source Dates** area.

Important

For regular (non-overlap) templates, the date range must be one week. If you enter a different date range, WFM Web automatically adjusts it to one week. **Overlap** templates, which fill in gaps in historical data, have specified start and end dates.

5. [Select](#) or enter the **Start date** and **End date** into the corresponding fields in the **Target Dates** area.
You can select **Target Dates** that are different from **Source Dates** for these template types: **IV Overlap**, and **AHT Overlap**.
6. Select the **Activities** that you want to be associated with this template.
7. Click **OK**.
The new forecast template now appears in the [Forecast Templates List view](#).