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Workforce Management Web for Supervisors Help

Forecasts

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Forecasts

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 "Forecasts" page in the *Workforce Management Supervisor Help*, which describes the new **Forecast module**.

Use the **Forecast** module to create and edit forecast **scenarios**, and to publish the best scenario to the Master Forecast. See **descriptions of the buttons** shown in the toolbar image below.



You can use the forecast views to:

- **Create forecast scenarios.**
- View **your scenarios** and the **Master Forecast**.
- Evaluate **volume** and **staffing** estimates for your scenarios and the Master Forecast.
- **Publish** forecast scenarios to, and extract them from, the Master Forecast.
- **Add** or **remove** activities from a forecast scenario.
- Create, modify, and apply **forecast templates**.

About Forecasting

A *forecast* is a prediction of **activity** workloads for one or more sites, and consists of:

- Predicted customer-interaction volumes, which include information for phone calls, chat, email, outbound calling, back-office work, and so on.
- Predicted average handling time (AHT).
- Staffing (workforce) requirements based on service objectives.

Workforce Management uses these predictions to build optimal schedules for real agents, or for a generic staff of profiles based on those agents. For links to major forecast help topics, see **Creating and Working with Forecasts**, below.

Creating and Working with Forecasts

1. The first step in creating a new forecast is to create a forecast scenario for one or more **activities** using the **New Forecast Wizard**. The Wizard **General Parameters screen** gives the option of creating a scenario with no forecast numbers (to be supplied later) or basing the scenario on an existing forecast.
2. If you created a scenario with no forecast numbers, open the **Scenario Volumes View** and use the **Volume Build Wizard** to build interaction volume and AHT forecasts for each activity. You can use various **methods** to build volume, including entering values, using **historical data** or **templates**.
3. Next, open the **Scenario Staffing View** and build a staffing forecast for each activity.
4. After you create and evaluate your scenarios, **publish** the best scenario to the Workforce Management database. This scenario then becomes the **Master Forecast**. WFM Web builds schedules based on the data in the Master Forecast.

Watch the Videos

Watch the 4-video series about creating, populating, and publishing forecasts, starting with **Video 1**.

Using the Forecast Scenarios View

The **Scenarios View** enables you to open and work with existing scenarios. It also enables you to create, edit, or delete forecast scenarios, and to publish them to the Master Forecast.

- In the Modules tree, click **Forecast > Scenarios** to activate the **Scenarios** view.

Using Other Scenario Views

When you open a forecast scenario, the following views appear on a scenario-specific drop-down menu in the toolbar: **Volumes**, **Staffing**, **Overheads**, and **Graphs**.

- Click a view to open it.

These view options appear on the Views toolbar's Scenarios drop-down list.

Opening additional scenarios adds their view options to these lists. This enables you to switch among views for several open scenarios.

- To remove a scenario's views from the displayed lists, **close** that scenario.

Using the Master Forecast Views

If you have access rights to the Master Forecast, then the Modules tree's Forecast branch always displays three Master Forecast views (regardless of your scenario selections): **Master Forecast**

Volumes View, Master Forecast Staffing View, and Master Forecast Graphs View.

- Click these views to open them.

Using Historical Data in Forecasts

In most cases, forecasts are based on historical data.

- If historical data for interaction volumes and average handling time (AHT) has been imported, you can create both interaction-volume forecasts and AHT forecasts simultaneously.
- If historical data exists for interaction volume but not for AHT, first create the interaction-volume forecast using any of the forecasting methods. Then create the AHT forecast using a template.
- If historical data exists for AHT but not for interaction volume, first create the interaction-volume forecast using templates. Then create the AHT forecast using any of the forecasting methods.

Actions Toolbar

You can use the following buttons on the toolbar (the same commands also appear on the **Actions** menu):

Icon	Name	Description
	Publish	Opens the Publish Forecast Wizard , where you can publish a forecast directly to the master schedule.
	Add activity	Opens the Add Activity window , where you can add activities to this forecast scenario.
	Remove activity	Opens the Remove Activity window , where you can remove activities from this forecast scenario.
	Save	Saves your changes to this forecast scenario.
	Save as Template	Save this forecast scenario as a template.
	Build	Opens the Volumes Build Wizard , which builds volume data for the selected activity.
	Comments	Opens the Comments window , where you can enter comments for each day of the forecast.

Icon	Name	Description
	Open / Close	Opens the highlighted scenario, closes the current scenario.
	Use multi-site activities	Controls whether WFM Web's calculation of aggregated information includes multi-site activities. You can select this button only if you first select a multi-site activity, business unit, or enterprise in the Objects tree.
	Required Staffing	Opens the Required Staffing dialog box . Use it to modify required staffing data in the grid.
	Split	Opens the Volume Split Wizard , which splits interaction volumes from a multi-site activity to site-specific activities.
	Budgeting	Opens the Budgeting Information dialog box , where you to specify the start and end dates of the target range, paid hours and wage that are to be used by the Staffing Forecast Wizard.