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Workforce Management Web for Supervisors Help

New Forecast Wizard

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New Forecast Wizard

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

Use the **New Forecast Wizard** (NFW) to create a new forecast scenario. Defining a forecast scenario involves naming the forecast, defining a forecast date range, adding comments (optional), and selecting the activities the forecast will cover. You also have the option of basing the scenario on an existing forecast or building the numbers later.

This is Video 1 in a 4-video series. When you are ready to build volumes for the scenario, watch [Video 2](#).

Link to video

To use the **New Forecast Wizard**:

1. Select the **Forecast** tab.
2. Select **Scenarios** from the **Views** menu.
3. Click **New**  on the **Forecast Scenarios** view toolbar.
The first of the **New Forecast Wizard's** screens, **General Parameters**, opens.
4. Fill in the **General Parameters** screen and then click **Next**. The **Select Activity** screen opens.
5. Select one or more activities and then click **Finish**.

After you create a scenario, you can build interaction volume, AHT, and staffing forecasts, add comments, and publish the scenario. For details, see [Forecast Scenarios Overview](#).

Terminology Review

To better understand WFM forecasting and scheduling views and dialog boxes, it is helpful to review certain WFM terminology.

Activities

Activities are work items that are tracked and managed using Genesys Workforce Management. On a general level, example activities are answering inbound calls, responding to email, completing after-call work, performing scheduled callbacks, and participating in chat sessions. When you create forecasts and schedules, these activities are typically associated with a specific product, such as inbound calls for product A, inbound calls for product B, and so on. In the Configuration Utility, activities are associated with skills. You define separate activities for each site or business unit.

Sites

Sites can be equivalent to switches, which are originally defined in Genesys Administrator and then imported into WFM via WFM Server. See "Creating Switch Objects" in [Genesys Adminsitrator Extension Help](#).

You can also create sites that are unrelated to a switch. This is appropriate when switches do not correlate with your company's organization. For example, a single location could be divided into multiple entities to reflect divisions along business unit lines.

Sites can use *activity sets*, which provide a means to combine activities into groups for multi-skilled scheduling. During that time:

- Agents can only work on the activities defined for the activity set.
- Scheduler cannot schedule meals at times that would interrupt the activity set.

Business units cannot use activity sets.

Business Units

A *business unit* consists of a set of sites that may be grouped together because the agents at the sites perform the same activity, or for ease of management.

Multi-Site Activities

Multi-site activities combine activities at some or all of the sites in a business unit, as well as independent sites, for tracking purposes.