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Workforce Management Web for Supervisors Help

Required Staffing Wizard

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Required Staffing Wizard

Use the Required Staffing Wizard to define required staffing values in a forecast scenario's **Staffing view**.

Tip

Before selecting the template option in this dialog box, **create templates** as needed.

To set required staffing by using this wizard:

1. Open a **Forecast scenario**, and its **staffing view**.
2. Select **Required Staffing** from the **Action** menu or click the toolbar icon (). The **Required Staffing Wizard** starts.
3. Select one of the following radio buttons at the **Select Data Source** screen:
 - **Load Calculated Staffing**—Apply calculated staffing to required staffing with no changes.
 - a. Click **Finish**.
The wizard ends here, if you make this choice.
 - **Load Calculated Staffing, adjusted by**—Enter (into the adjacent field) a percentage by which to adjust calculated staffing, before applying it to required staffing. Valid values are from -99 to 999.
 - a. Click **Finish**.
The wizard ends here, if you make this choice.
 - **Load Calculated staffing, adjusted using overheads**—Use the overheads will be selected in the **Select Overheads** screen to adjust calculated staffing, before applying it to required staffing.
 - a. Click **Next** to display the **Select Overheads** screen.
 - b. Select one or more items from the list.
WFM applies the overheads that you select to calculated staffing and saved as required staffing.
 - c. Click **Finish**.
The wizard ends here, if you made this choice.
 - **Use Templates**—Apply the staffing templates that will be selected in the **Select Templates** screen to required staffing.
 - a. Click **Next** to display the **Select Templates** screen.
 - b. Select one or more templates from the **Templates** list on the left side, and click the **>>** button to move your selections to the **Applied Templates** list on the right side.

Tip

You can modify a template's characteristics after selecting it on the left side and before moving it to the right side.

- c. Optional: Select each template on the left side and adjust its configuration using the controls below the list: **Start Date**, **End Date**, and day of the week check boxes.
- d. When you have made all necessary adjustments, click Finish.
The wizard ends here, if you made this choice.

About Required Staffing

Required—staffing data is user-defined staffing requirements for a forecast scenario.

- If you have compiled calculated-staffing values, you have the option of setting required staffing to the same values as calculated staffing.
- Forecasts can contain both calculated and required data. You can build schedules by using either set of data.
- Required staffing can be composed of a combination of template values, manually entered amounts, and calculated staffing values.