Workforce Management Web for Supervisors Help

Staffing Build Wizard

12/19/2025

Staffing Build Wizard

Use the Staffing Build Wizard to build staffing data for a selected single-site activity or multi-site activity, based on parameters that you provide. For information about building staffing forecasts for multiple activities, see Staffing Build Wizard for Multiple Activities.

> ### Important
>
> Before using this wizard to build a staffing forecast, take these required actions:
>
> - Build interaction volumes and AHT for activities.
>
> - If necessary, create templates.
>
> - Build a volume forecast for multi-site activity for both IV and AHT.
>
> - Be aware that even if there is IV and AHT data for all child activities, this wizard does not build a staffing forecast for the parent multi-site activity.

This is Video 3 in a 4-video series. You can watch Video 2 here or, when you are ready to publish the forecast scenario, watch Video 4.

Link to video

To build staffing data:

1. On the Scenario Staffing View toolbar, click the **Build** button.
   The Staffing Build Wizard's first screen, Provide Target Date, opens.

2. Fill in the Provide Target Date screen and then click **Next**.

3. Fill in the Provide Target Options screen and then click **Next**.

4. The screen that appears next depends on what kind of activity you are staffing. If you are staffing:

   - An **Immediate** activity, and you select the **Use Service Level Objectives check** box, the Specify Service Level Objectives screen opens.
     If you do not select Use Service Level Objectives, the Staffing Requirements screen opens.

   - A **Deferred** activity, the Multimedia Service Level Objectives screen opens.

   - A **Fixed-Staff** activity, the Staffing Requirements screen opens.

5. Fill in each screen that opens, and then click **Finish**.
   The wizard closes and the Scenario Staffing View opens.

6. Alternatively, if you selected **Compare results with previous** on the second wizard screen, the **Scenario Build Results** window opens.

The types of activities mentioned in the procedure above are described as follows:

- **Immediate** activity—Work activities that are handled by agents immediately, such as voice calls.
- **Deferred** activity—Backlog activities, such as email, that use special forecasting calculations.
- **Fixed-Staff** activity—Non-CTI activities that do not use Workforce Management service objectives.

Fill in each screen that opens, and then click **Finish**. In some cases, the **Staffing Build Wizard** displays values for objectives that were used for the most recent staffing build or the default forecasting objective values (if these have been specified and there were no previous builds). Otherwise, the parameter values are left blank.

Forecast Staffing Build Wizard Screens

The **Staffing Build Wizard** screens are described in the following topics.

- Provide Target Date
- Provide Target Options
- Specify Service Level Objectives
- Specify Multimedia Service Level Objectives
- Staffing Requirements