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Workforce Management Web for Supervisors (Classic) Help

[Forecast Scenarios View](#)

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- Supervisor

Use this view to open and manage forecast scenarios created by you and others (if shared).

Related documentation:

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At the top of the **Scenarios** view you'll find the **Actions** toolbar. See the toolbar image here and the button descriptions below.



This view enables you to delete forecast scenarios, publish data from a scenario to the Master Forecast, and extract data from the Master Forecast to a scenario.

Displaying the view

1. Select **Forecast** from the **Home** menu on the toolbar.
2. Select **Scenarios** from the **Forecast** menu.

Selecting Objects

When the **Scenarios** view is active, the **Objects** tree displays existing forecast scenarios in a hierarchical list. The **All Scenarios** node expands to display the following options:

My Scenarios	Displays scenarios that you have created.
Shared Scenarios	Displays shared scenarios created by other users.
Other Scenarios	Displays unshared scenarios created by other users. Visible only if you have the appropriate access rights. See the Forecast role privileges

You can select **All Scenarios** or a lower-level option. Your selection retrieves matching scenarios and inserts them into the Scenarios table.

Reading the Scenarios table

The **Scenarios** table appears at the upper right. Its rows display scenarios that match your selection

in the **Objects** tree. The columns (sortable by clicking the header) display the following information for each scenario:

Name	The scenario's name.
Start date, End date	The start and end dates for the forecast in this scenario.
Owner	The name of the user who created the scenario.
Shared	A check mark indicates a shared scenario; an open box indicates one that is not shared.
Comments	Remarks entered by a user who created or edited the scenario.

- Click a row in the Scenarios table to populate the Scenario Properties pane with the scenario's details.

Editing scenarios

To edit a scenario:



- Click its row in the **Scenarios** table and then click Open on the **Actions** toolbar or select **Open** from the **Actions** menu.
- As an alternative, double-click a scenario.

The controls described below are available if you own, or have access rights to, the scenario.

Toolbar: Managing scenarios

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

Icon	Name	Description
	New	Opens the New Forecast Wizard.
	Create Based On...	Opens the New Forecast Wizard, with the currently selected forecast as the default value in the Based On field.
	Open	Opens the selected scenario from the Scenarios table.
	Close	Closes the selected scenario (and prompts you to save unsaved data).
	Publish	Opens the Publish Forecast Wizard for transferring forecast information between the selected scenario and the Master

Icon	Name	Description
		Forecast.
	Delete	Deletes the selected scenario.
 	Mark as Shared, Mark as Not Shared	Changes the sharing status of the selected scenario.
	Sort	Opens the Sorting dialog, which allows sorting by name, owner, sharing, time of creation, time of last modification, scenario start date, or scenario end date. You can sort in ascending or descending order.

Scenario properties

In the **Scenario Properties** pane at the lower right:

Data tab

Click the **Data** tab to display the following controls:

- **Name**—Enables you to edit the scenario's name.
- **Start date, End date**—Displays the scenario's start and end dates.
- **Owner**—Displays the name of the scenario's creator.
- **Created, Modified**—Displays the scenario's original creation date and last modification date.
- **Shared**—A check mark indicates a shared scenario; an open box indicates one that is not shared.
- **Comments**—Enables you to enter or edit comments about the scenario.
- **Save**—Click this button to save your changes to the scenario's name and/or comments.
- **Cancel**—Click this button to cancel changes, restoring the scenario's previous name and/or comments.

Statuses tab

Click the **Statuses** tab to display a table with the following information:

- **Activity**—Lists each activity in the scenario, preceded by its site or Business Unit.
- **Volumes**—A check mark indicates that interaction volume was built for this activity.
- **AHT**—A check mark indicates that average handle time was built for this activity.
- **Calc. staff**—A check mark indicates that calculated staffing was built for this activity.
- **Req. staff**—A check mark indicates that required staffing was built for this activity.

Adding and removing activities

Use the **Add Activity** and **Remove Activity** views to change the activities that are associated with the current forecast scenario.

Adding activities

Use the **Add Activity** view to change the activities that are associated with the current forecast scenario:

1. Select the check box next to any activity that you want to include.
You can select from multiple sites.
2. Click **OK**.
The previous view reappears. Its displayed data changes to match your selections.

Removing activities

Use the **Remove Activity** view to change the activities associated with the current forecast scenario:

1. Clear the check box next to any activity that you want to remove.
You can clear activities from multiple sites.
2. Click **OK**.
The previous view reappears. Its displayed data changes to match your selections.

Adding comments to a forecast

Use the **Comments** view to add comments to activities in forecast scenarios as reminders or as a record of any manual changes made. For example, you might want to add a comment after making manual changes to a scenario, so that you can keep a record of the changes.

You can add comments only for an activity, not for a site. Activities in Forecast scenario can have numerous comments, including a new comment for each day.

Adding comments to forecast scenarios

To add comments:

1. Click the **Comments** button on the **Forecast Scenario View** toolbar.

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2. In the **Comments** window that appears, click **New** at the upper right.
The lower panel's label changes to New comment.
 3. Adjust the **Comment** date, using the date-selection controls.
By default, the start date of the forecast appears.
You cannot select a date outside the forecast scenario's date range. If you try to enter more than one comment per date, an error message alerts you to either select a different date or edit (or delete) that date's existing comment.
 4. Type your comments into the large text box at the bottom left.
 5. Click **Apply** to add your comment to the upper list, or **Cancel** to discard it.
 6. Make any other changes that you want to make in this window and then do one of the following:
 - Click **Save** to save all of your changes and close the **Comments** window.
 - Click **Close** to discard all of your changes and close the **Comments** window.**The previous forecast scenario view reappears. Your new comments are now attached to the scenario.**

Editing comments

To edit comments:

1. Click the **Comments** button on the **Forecast Scenario View** toolbar.
The Comments window appears. The upper section of the window lists previously entered comments.
2. Click an existing comment to select it.
The comment's text appears in the large text box at the bottom left.
3. Click **Edit**.
4. Edit the comment text in the large text box.
5. Click **Apply** to save your edits, or **Cancel** to discard them.
6. Make any other changes that you want to make in this window, then do one of the following:
 - Click **Save** to save all of your changes and close the **Comments** window.
 - Click **Close** to discard all of your changes and close the **Comments** window.**The previous forecast scenario view reappears.**

Deleting comments

To delete comments:

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1. Click the **Comments** button on the **Forecast Scenario View** toolbar.
The Comments window appears. The upper section of the window lists previously entered comments.
 2. Click an existing comment to select it.
The comment's text appears in the large text box at the bottom left.
 3. Click **Delete**.
The comment is deleted immediately. There is no confirmation prompt.
 4. Make any other changes that you want to make in this window; then do one of the following:
 - Click **Save** to save all of your changes and close the **Comments** window.
 - Click **Close** to discard all of your changes and close the **Comments** window.

The previous forecast scenario view reappears.