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Workforce Management Web for Supervisors (Classic) Help

[Forecasts](#)

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- Supervisor

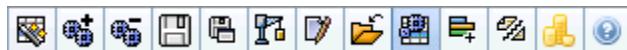
Use the Forecast views to create and edit forecast scenarios and publish optimal scenarios to the Master Forecast.

Related documentation:

-

The **Forecast** topics explain how to make workload and staffing predictions for one or more sites.

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.

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 Administrator 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.

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, Master Forecast Staffing, and Master Forecast Graphs.

- 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.

Using the 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. |
|  | 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, |

| Icon | Name | Description |
|---|--------------------------|--|
| | | or enterprise in the Objects tree. |
|  | Required Staffing | Opens the Required Staffing Wizard. Use it to modify required staffing data in the grid. |
|  | Split | Opens the Volumes Split Wizard, which splits interaction volumes from a multi-site activity to site-specific activities. |
|  | Budgeting | Opens the Staffing Budgeting Information dialog, where you can specify the start and end dates of the target range, paid hours and wage that are to be used by the Staffing Forecast Wizard. |