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# Workforce Management Web for Supervisors (Classic) Help

Forecast Reports

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Use these reports to display the anticipated activity and staff requirements data in tabular or graph format.

### Related documentation:

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The Forecast reports are:

- Forecast Report.
- Forecast Graphs Report.

To create a report, click that report's link (above) and follow the steps.

For a complete list of all WFM reports, see the Reports List.

## Restrictions

There are some restrictions when working with reports.

### Security restrictions

You can view and print reports only for those sites for which you have security access.

### Date restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.
- If you select intra-day granularity, the **End Date** selector is disabled.

## Forecast Report

To configure the report:

1. On the **Reports** tab, select **Forecast Reports** from the Views menu.

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2. From the list in the Objects pane, select **Forecast Report**.  
**The Reports Wizard's first screen, Header, appears.**
  3. To print a header on the report, select **Show Header** and type your header text into the text box.
  4. Click **Next**.
  5. On the **Scenario** screen, select a forecast scenario or the Master Schedule.
  6. Click **Next**.  
**You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Forecast.**
  7. On the **Date Range** screen:
    1. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
    2. Select **Activity**, **Site**, **Multi-site Activity**, or **Business Unit** from the drop-down list.
    3. Click **Next**.
  8. In the **Data** screen, select forecast targets.  
**This tree on this page displays activities, sites, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.**
  9. If you want to display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report, select the mode by checking or unchecking **Show staffing totals information in man hours instead of FTE**. The default value of this option will be the same as the settings in Changing the staffing display from FTE to man hours.
  10. Click **Next**.
  11. On the **Forecast Data Types** screen, select the data types you want to include.
  12. Click **Finish**.  
**The report appears in the Report Viewer.**

Here's what's in the report:

<b>Site Information or Business Unit Information or Enterprise [header]</b>	The site name and time zone, if you selected activity as the report's target.  The business unit name and time zone, if you selected multi-site activity or site as the report's target. The enterprise, if you selected business unit as the report's target. (Each root is displayed separately.)
<b>Activity, Multi-Site Activity, Site, or Business Unit [header]</b>	The report is organized by activity, multi-site activity, site, or Business Unit – depending on the target that you selected in the Reports Wizard.
<b>Date/Date Period [header]</b>	The dates covered by the report. The report displays separate information for each target and date. This header shows the Date if you selected Intra-day granularity and Date Period for other granularities.
<b>Time Step, Day, Week Of, X Weeks of, Month</b>	The time period shown. The header and the column contents depend on the granularity that you selected.

<b>Statistics/Options [columns]</b>	<p>The forecast value, for each period, for the display options that you selected in the wizard. The possible columns are:</p> <ul style="list-style-type: none"> <li>• Interaction Volume</li> <li>• Average Handling Time</li> <li>• Calculated Staffing</li> <li>• Required Staffing</li> <li>• Service Level</li> <li>• Deferred Service Level</li> <li>• ASA</li> <li>• Abandons Factor</li> <li>• Max. Occupancy</li> <li>• Historical data Interaction Volume</li> <li>• Historical data Average Handle Time</li> </ul> <p>If you select a scenario, other than the Master Forecast, the historical data types in this list are not available.</p>
<b>Total/Average for Activity/Site [footer]</b>	<p>The total or average forecast value for each statistic shown in the table for this activity or site.</p> <p>If you generate reports in .CSV-friendly format, the <b>Total/Average for Activity</b> values are displayed in separate columns and not as a footer.</p>
<b>Total/Average for Site/Business Unit [footer]</b>	<p>The total and/or average forecast value for each displayed option for the displayed target.</p>

## Forecast Graph Report

To configure the report:

1. Complete steps 1 to 6 in Configuring the Forecast Report, selecting **Forecast Graphs Report** in the Objects pane.
2. On the **Date Range** screen:
  1. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
  2. Select **Activity** or **Multi-site Activity** from the drop-down list.
  3. Click **Next**.
3. If you want to display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report, by select the mode by checking or unchecking **Show staffing totals information in man hours instead of FTE**. The default value of this option will be the same as the settings in Changing the staffing display from FTE to man hours.

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4. On the **Data** screen, select forecast targets.  
**The tree's contents depend on your choice of target. You can expand business units to display their sites or multi-site activities. You can expand sites to display their activities. You can make multiple selections.**
  5. If you selected **Multi-site Activity** or **Activity** as the target, click **Next**.
  6. On the **Forecast Data Types** screen, select the data types you want to include.
  7. Click **Finish**.  
**The report appears in the Report Viewer.**

Here's what's in the report:

<b>Site or Business Unit [header]</b>	The site, or Business Unit, and time zone included in the report.
<b>Activity or Multi-Site Activity [header]</b>	The activity or multi-site activity displayed in the following graph.
<b>Date [header]</b>	The dates covered by the report. The information in the report is shown separately for each activity, display option, and date.
<b>Statistics/Options [graph bars]</b>	<p>Each display option is shown in a separate graph. The displayed statistic, and its units, are labeled on the left side. The possible columns are:</p> <ul style="list-style-type: none"><li>• Interaction Volume</li><li>• Average Handling Time</li><li>• Calculated Staffing</li><li>• Required Staffing</li></ul>
<b>Timestep / Day / Week of / Month / X weeks of</b>	The time period covered by each bar in the graph. The period depends on the granularity that you selected in the wizard.