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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.

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:

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

<p>Statistics/Options [columns]</p>	<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"> • Interaction Volume • Average Handling Time • Calculated Staffing • Required Staffing • Service Level • Deferred Service Level • ASA • Abandons Factor • Max. Occupancy • Historical data Interaction Volume • Historical data Average Handle Time <p>If you select a scenario, other than the Master Forecast, the historical data types in this list are not available.</p>
<p>Total/Average for Activity/Site [footer]</p>	<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 Total/Average for Activity values are displayed in separate columns and not as a footer.</p>
<p>Total/Average for Site/Business Unit [footer]</p>	<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.

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:

Site or Business Unit [header]	The site, or Business Unit, and time zone included in the report.
Activity or Multi-Site Activity [header]	The activity or multi-site activity displayed in the following graph.
Date [header]	The dates covered by the report. The information in the report is shown separately for each activity, display option, and date.
Statistics/Options [graph bars]	<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"> • Interaction Volume • Average Handling Time • Calculated Staffing • Required Staffing
Timestep / Day / Week of / Month / X weeks of	The time period covered by each bar in the graph. The period depends on the granularity that you selected in the wizard.