# GENESYS™

# Workforce Management Web for Supervisors (Classic) Help

## Master Forecast

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# Contents

- Supervisor

View statistics, staffing, and overhead data in the Master Forecast and customize the statistics display in graph or table format.

**Related documentation:**
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The views in the Master Forecast are:

- **Master Forecast** Volumes—Enables you to view the Master Forecast's Interaction Volumes and AHT.
- **Master Forecast** Staffing—Enables you to view the Master Forecast's Calculated and Required Staffing.
- **Master Forecast** Overheads—Enables you to view Overhead data, which WFM uses to forecast shrinkage while scheduling.
- **Master Forecast** Graphs—Displays your choice of statistics for the Master Forecast, using line charts and a table containing forecast values.

To open the views:

1. From the **Home** menu on the toolbar, select **Forecast**.
2. From the **Forecast** menu on the toolbar, select **Master Forecast**.
3. From the **Master Forecast** menu on the toolbar, select **Volumes**, **Staffing**, **Overheads**, or **Graphs**.
4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit** or **Enterprise**.

## Master Forecast Volumes

Use the **Volumes** view to display the Master Forecast's Interaction Volumes and AHT. See the toolbar image here the button descriptions below.
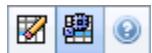


This view provides standard date-selection controls and a grid that shows statistics for days or timesteps.

### Displaying the Volumes data

To displaying the **Volumes** data:

1. From the **Home** menu on the toolbar, select **Forecast**.

2. From the **Forecast** menu on the toolbar, select **Master Forecast**.

3. From the **Master Forecast** menu on the toolbar, select **Volumes**.

4. In the **Objects** tree, select an **activity**, **multi-site activity**, **Site**, **Business Unit**, or **Enterprise**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

## Setting the data display properties and date range

Use these controls to customize the **Volumes** data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Week**, or **Planning Period**.
  If you select **Week**, you can further adjust each row's time range by selecting 15, 30, or 60 (minutes) from the **Granularity** drop-down list.

- **Show Statistics** *drop-down list*—Specify what data is displayed in the graph and table by selecting from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**.

- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Volume**, **Volume %**, and **AHT** check boxes.

- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

## Reading the data

The **Volumes** table provides columns that display the following statistics:

| | |
|---|---|
| **Week/Time Step** | Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the date range and granularity that you selected above.) |
| **[Days or Dates]** | If you select the **Month** date range, each group of columns shows statistics for one full day. <br><br>If you select the **Week** date range, each group of columns indicates one date, the top row shows daily totals, and each lower row shows statistics for one timestep on that date. <br><br>(Timestep durations depend on the granularity that you selected above.) |
| **IV** | Shows the interaction volume forecasted for each day or timestep. |
| **IV%** | Shows this row's percentage of the day's total interaction volume. |
| **AHT** | Shows the average handling time. |
| **Weekly Totals** | If you select the **Month** date range, these columns show weekly totals, or averages, for the **IV**, **IV%**, and **AHT** statistics. |

## Cleanup and calculation options

Choose these commands from the **Volumes Actions** menu or select their icons from the toolbar:

| Icon | Name | Description |
|------|------|-------------|
|  | **Cleanup** | Opens the Master Forecast Cleanup Window, where you can remove information from the Master Forecast for selected dates and activities. |
|  | **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**, or **Enterprise** in the **Objects** tree.<br><br>If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity. |

# Master Forecast Staffing

Use the **Staffing** view to display the Master Forecast's calculated and required staffing. See the toolbar image here and the button descriptions below.
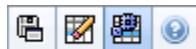


This view provides standard date-selection controls and a grid that shows staffing levels for days or timesteps.

## Displaying the Staffing data

To displaying the **Staffing** data:

1. Follow the steps in Displaying the Volumes data.

2. In step 3, select **Staffing**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

## Setting the data display properties and date range

Use these controls to customize the **Staffing** data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Week**, or **Planning Period** from the **Period** drop-down list.
  If you select **Week**, you can further adjust each row's time range by selecting 15, 30, or 60 (minutes) from the **Granularity** drop-down list.

- **Show Statistics** *drop-down list*—Specifies what data is displayed in the graph and table. Select from these choices: **Calculated Staffing**, **Required Staffing**, **Calculated and Required Staffing**.

- **Show Columns** *check boxes*—Show (or hide) data columns in the table by selecting or clearing the **Calc** (calculations) and **Req** (requirements) check boxes.

- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

## Reading the data

The **Staffing** table provides columns that display the following statistics:

| | |
|---|---|
| **Week/Time Step** | Identifies the range of dates or timesteps on this row. (The column's label and contents depend on the Master Forecast that you selected above.) |
| **[Days or Dates]** | If you select the **Month** date range, each group of columns shows statistics for one full day.<br><br>If you select the **Week** date range, each group of columns indicates one date, the top row shows daily totals, measured in **Full Time Equivalents**. Each lower row shows statistics for one timestep on that date.<br><br>(Timestep durations depend on the granularity that you selected above.) |
| **Calc** | Shows the calculated number of agents for each day (measured in Full Time Equivalents) or for each timestep (measured in single skill equivalents). |
| **Req** | Shows the required number of agents for each day (measured in Full Time Equivalents) or for each timestep (measured in single skill equivalents). |
| **[Weekly Totals]** | If you select the **Month** date range, the columns at right show weekly totals for the displayed statistics. |

## Save as template, cleanup, and calculation options

You can use the following buttons on the **Staffing** toolbar (these commands also appear in the **Actions** menu):

| Icon | Name | Description |
|---|---|---|
|  | **Save As Template** | Opens the Save as Template Wizard, where you can save |

| Icon | Name | Description |
|---|---|---|
| | | **Master Forecast** data as a forecast template. |
|  | **Cleanup** | Opens the Cleanup Master Forecast window, where you can remove information from the **Master Forecast** for selected dates and activities. |
|  | **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**, or **Enterprise** in the **Objects** tree.<br><br>If you set this button to **On**,  WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity. |

## Master Forecast Overheads

Use the **Overheads** view to view overhead data, which WFM uses to forecast shrinkage while scheduling. See the toolbar image here and the button descriptions below.



## Setting the grid properties and date range

Use these options in the **Overheads Grid** properties and **Date Range** panes (near the top) to customize the grid:

- The grid displays data for a period of a year, month, week or planning period. To change the period, click **Year**, **Month**, **Week**, or **Planning Period** in the **Period** drop-down list to change the time range that is shown on each row. (WFM Web prompts you to save any unsaved edits before it refreshes the display.)

- If you select **Week**, you can further adjust each row's time range by selecting a **Granularity** of 15, 30, or 60 minutes.

- Use the standard date-selection controls to jump to a different week.

## Overhead menu

The **Overhead** drop-down menu displays a list of overheads:

| | |
|---|---|
| **Grand Total** | A read-only statistic; the aggregate overhead for the selected target. |
| **Total Planned** | A read-only statistic; the aggregate planned overhead for the selected target. |
| **Total Unplanned** | A read-only statistic; the aggregate unplanned overhead for the selected target. |

> ### Important
> Read-only statistics appear in the **Overhead** menu for the item that is selected in the **Object** pane. If the item is an activity, then the menu lists all **Schedule State Group** overheads that are associated with the activity. If the item is a multi-site activity, the menu lists all **Schedule State Group** overheads that are associated with its child activities.

## Using the grid

The **Overheads** grid provides columns that display the following statistics:

| | |
|---|---|
| **Week/Time Step** | Identifies the range of dates or timesteps on this row.<br><br>(The column's label and contents depend on the date range and granularity that you selected above.) |
| **[Days or Dates]** | If you select the **Month** date range, each group of columns shows statistics for one full day.<br><br>If you select the **Week** date range, each group of columns indicates one day.<br><br>(Timestep durations depend on the granularity that you selected above.) |
| **[Weekly Totals]** | If you select the **Week** date range, the columns at right show weekly totals for the displayed statistics. |

> ### Tip
> You can copy and paste data between the grid and a spreadsheet.

## Clean up Overhead data

You can use the following buttons on the **Overheads Actions** toolbar (these commands also appear on the **Actions** menu):

| Icon | Name | Description |
|---|---|---|
| 🖊 | **Cleanup** | Opens the Cleanup Master Forecast window, where you can remove information from the Master Forecast for selected dates and activities. |

## Master Forecast Graphs

Use the **Graphs** view to display Master Forecast data in a line chart and a table containing forecast values. See the toolbar image here and the button descriptions below.
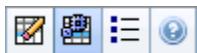
### Displaying the Graphs data

To display the **Graphs** data:

1. Follow the steps in Displaying the Volumes data.

2. In step 3, select **Graphs**.

The view displays a graph above a table, each containing the same statistics, and controls that set the data display properties for the graph and table.

### Setting the data display properties and date range

Use these controls to customize the **Graphs** data display in the graph and table:

- **Period** *drop-down list*—Change the time range for the graph and the grid by selecting **Year**, **Month**, **Planning Period**, **Week**, or **Day**.

- **Granularity** *drop-down list*—Specify the increments (granularity) in the data display by selecting from this menu. What choices are available depends upon your selection in the **Period** drop-down list:

  - If you select **Year**: **Monthly**, **Weekly**, or **Daily**.

  - If you select **Month**: **Weekly** or **Daily**.

  - If you select **Planing Period**: **Weekly** or **Daily**.

  - If you select **Week**: **15** (minutes), **30** (minutes), **60** (minutes), or **Daily**.

  - If you select **Day**: **15** (minutes), **30** (minutes), or **60** (minutes).

- **Show Statistics** *drop-down list*—Specifies what data is displayed in the graph and table. Select from these choices: **Interaction Volume**, **AHT**, **Interaction Volume and AHT**, **Calculated Staffing**, **Required Staffing**, **Calculated and Required Staffing**, **Calculated and multi-skill calculated staffing**. Columns in the table are displayed accordingly to the selected statistic.

- Use standard date-selection controls (in the upper right portion of the window) to jump to a different week within the **Master Forecast's** date range.

## Reading the data

The graph shows the statistics, dates, period, and granularity that you selected above. The vertical axis indicates the units shown. If you display multiple statistics, the right and left vertical axes display different units for the two statistics.

The **Legend**, at the bottom, identifies the colors that the graph uses to represent particular statistics, events, or historical data. The **Legend** changes depending on the statistics you selected above. Special events appear as markers on the graph.

## Cleanup, calculation, and other options

You can use the following buttons on the **Graphs** toolbar (these commands also appear in the **Actions** menu):

| Icon | Name | Description |
|---|---|---|
| | **Cleanup** | Opens the Cleanup Master Forecast window, where you can remove information from the **Master Forecast** for selected dates and activities. |
| | **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**, or **Enterprise** in the **Objects** tree. <br><br> If you set this button to **On**, WFM retains your last selection—in the current view and for all other views that contain multi-site activities—preventing you from having to click it every time you want to display data for the selected multi-site activity. |
| | **Options** | Opens the Options dialog box, where you can further customize the graph. |