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Workforce Management Web for Supervisors (Classic) Help

New Forecast Wizard

7/2/2022

Contents

- [1 Creating forecast scenarios](#)
- [2 Defining general parameters](#)
- [3 Selecting activities](#)



- Supervisor

Set general parameters and select activities to create forecast scenarios that can be used as master forecasts.

Related documentation:

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Tip

Starting in this release, WFM has a new interface for the Forecast module. If you have landed on this page by accident and are using the new Supervisors interface, see the "Scenarios" page in the *Workforce Management Supervisor Help*, which describes the latest Forecast module.


Use the **New Forecast Wizard** to create a new forecast scenario. Defining a forecast scenario involves naming the forecast, defining a forecast date range, adding comments (optional), and selecting the activities the forecast will cover. You also have the option of basing the scenario on an existing forecast or building the numbers later.

Creating forecast scenarios

This is Video 1 in a 4-video series. When you are ready to build volumes for the scenario, watch Video 2.

[Link to video](#)

To use the **New Forecast Wizard**:

1. Select the **Forecast** tab.
2. Select Scenarios from the **Views** menu.
3. Click **New**  on the **Forecast Scenarios** view toolbar.
The first of the **New Forecast Wizard's** screens, General Parameters, opens.
4. Fill in the **General Parameters** screen and then click **Next**. The Select Activity screen opens.
5. Select one or more activities and then click **Finish**.

After you create a scenario, you can build interaction volume, AHT, and staffing forecasts, add comments, and publish the scenario. For details, see the Forecast Scenarios overview.

Defining general parameters

Use the General Parameters screen in the New Forecast Wizard to define your new forecast's name, dates, and other basic information.

1. In the **Name** text box, enter a name for the forecast scenario.
2. If you want to base this scenario on one that already exists, select the existing scenario (or the Master Forecast) from the **Based on** drop-down list. Otherwise keep **None** to create a scenario with no forecast numbers. You can then use the Volumes Build Wizard to populate the forecast.

Basing your new scenario on an existing scenario is a convenient way to build forecasts with frequently used settings. The wizard takes the dates activities from the source scenario, and applies them to the new scenario. You can then change these parameters.

3. In the **Start date** and **End date** text boxes, enter the scenario's start and end dates. You can type directly into each text box, use the up or down arrow to modify the displayed date, or click the button at right to display a calendar.

Tip

The scenario's date range cannot be more than two years.

4. If you want to fill the new scenario with data from the source (**Based on**) scenario, select the **Copy Data** check box.
If you did not select a value from the **Based on** drop-down list, this check box is disabled.
5. If you want this scenario to be available to other WFM users, select **Shared**.
6. If you want to enter comments about this scenario, use the **Comments** text box.
7. Click **Next** to proceed to the next screen.

Selecting activities

Use the Select Activity screen in the New Forecast Wizard to finish defining your new forecast.

1. Expand the applicable sites or business units.
2. Select the single-site or multi-site activities that you want to be included in this forecast. These are activities previously defined in the WFM Web.
You can expand business units to display their sites and multi-site activities, and you can expand sites to display their activities. You can select any number of activities.

By default, all activities are selected when this screen opens. Clear the check boxes for any activities that you do not want to include in this forecast scenario.

If you selected a value from the General Parameters screen's **Based on** drop-down list, the activities that were in the source scenario are selected in the **Activities** list. You can select any additional activities, or clear selected ones, to customize this forecast scenario.

Tip

You can add activities to a forecast after it has been created.

3. Click **Finish** to generate the new forecast.