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Workforce Management Web for Supervisors (Classic) Help

Publishing and Extracting Forecasts

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- Supervisor

Use a wizard to transfer unpublished forecast scenarios to Master Forecasts, or to extract Master Forecast information to forecast scenarios.

Related documentation:

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Use the wizard to:

- Publish forecast scenario data to the WFM database.
- Extract forecast scenario data from the WFM database.

Why publish forecasts?

- Publishing a forecast to the Workforce Management database means that the forecast is final. Schedules for a particular date range are based on the published (Master) forecast for those dates.
- Until a forecast is published, you cannot calculate certain performance data.

Publishing forecasts

This is Video 4 in a 4-video series. You can watch Video 3 [here](#).

[Link to video](#)

To publish a forecast:

1. In the **Forecast Scenarios** view's Scenarios Table, select the scenario that you want to publish. Then click the **Publish** button on the toolbar.
The Publish Forecast Wizard's Select Action screen appears.
2. Select **Publish to Master Forecast**, and then click **Next**.
The Publish to Master Forecast screen appears.
3. In the **Source Dates** section, use the date-selection controls to select the **Start date** and **End date**.
4. In the **Target Dates** section, use the date-selection controls to select the **Start date** and **End date**.
5. In the **Activities** list, select which activities you want to publish to the **Master Forecast**.

The tree shows all activities for which the selected scenario contains data. Expand business units to display their sites and expand sites to display their activities. You can select multiple activities from different sites.

6. Click **Finish**.

Defining start and end dates when publishing

You must understand what is defined by the start and end dates in each section in the procedure above:

- In the **Source Dates** section—The start and end date values define the date range of information you want to publish information from the selected scenario. By default, the selected scenario's own start and end dates appear in these text boxes. You cannot select dates outside the original scenario dates. **The scenario and target start dates occur on the same day of the week.**
- In the **Target Dates** section—The start and end date values define the date range for which you want to update information in the Master Forecast. By default, these fields' entries match those in the **Source Dates** section. Data from a specific weekday is copied only to the same weekday. That is, forecast information for a Monday is copied to one or more Mondays, depending on the target date range that you select. The Monday data is not copied to every day within the target date range.

Extracting forecasts

To transfer data from the **Master Forecast** into a forecast scenario:

1. In the **Forecast Scenarios** view's Scenarios Table, select the scenario to which you want to extract the data. Then click the **Publish** button on the toolbar.
The Publish Forecast Wizard's Select Action screen appears.
2. Select **Extract from Master Forecast**, and then click **Next**.
The Extract from Master Forecast window appears.
3. In the **Source Dates** section, use the date-selection controls to select the **Start date** and **End date**.
4. In the **Target Dates** section, use the date-selection controls to select the **Start date** and **End date**.
5. In the **Activities** list, select which activities you want to extract to the target scenario.
The tree shows all activities for which the Master Forecast scenario contains data. Expand business units to display their sites and sites to display their activities. You can select multiple activities from different sites.
6. Click **Finish**.

Defining start and end dates when extracting

You must understand what is defined by the start and end dates in each section in the procedure above:

- In the **Source Dates** section—The start and end date values define the date range for which you want to extract information from the Master Forecast. By default, these values match those in the **Target Dates** section.
- In the **Target Dates** section—The start and end date values define the date range for which you want

to update the information in the selected target scenario. By default, the scenario's own start and end dates appear in the text boxes. For an existing scenario, you cannot select dates outside the scenario's original date range.