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Workforce Management Web for Supervisors (Classic) Help

Volumes Build Wizard

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Contents

- 1 Building volumes in forecasts
- 2 Selecting activities
- 3 Selecting the data build method
 - 3.1 Build methods explained
- 4 Selecting historical data
- 5 Selecting templates
 - 5.1 Interaction volume templates
 - 5.2 Average handling time templates
 - 5.3 Interaction volume overlap templates
 - 5.4 Average handling time forecast overlap templates
- 6 Selecting events
- 7 Selecting events distribution



- Supervisor

Use the wizard to build volume data for one or more selected activities in forecast scenarios.

Related documentation:

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Use the Volumes Build Wizard (VBW) to build volume data for one or more selected activities, using parameters that you specify.

- Do this if you selected **None** in the **New Forecast Wizard** General Parameters window or if you wish to overwrite an existing Volumes scenario. If the correct Volumes data already exists in the Scenario Volumes view, you do not need to use this wizard.

Important

Depending on the build method you specify, you might need to import historical data or create interaction volume, average handling time, or overlap templates before using this wizard.

Building volumes in forecasts

This is Video 2 in a 4-video series. You can watch Video 1 here or, when you are ready to staff the scenario, watch Video 3.

[Link to video](#)

To build volume data:

1. Select a **Volumes** scenario.
2. On the Scenario Volumes view toolbar, click the **Build** button.
The Volumes Build Wizard's first screen, Select Activities, opens.
3. Complete the Select Activities screen and then click **Next**.
4. Complete the Select Data Build Method screen and then click **Next**.
5. The screens/buttons that appear next depend on the selected build method and whether you want to use an overlap template.

If you select:

- **Use Value**, supply interaction volume and/or average handling time values and click **Finish**.
- **Expert Average Engine**, **Universal Modeling Engine**, or **Copy Historical Data**, complete the Select Historical Data screen.
- **Template Based**, or **Use Overlap Templates** on the **Select Historical Data** screen, complete one or more screens for selecting templates.
- **Expert Average Engine** or **Universal Modeling Engine**, complete the Select Events screen.

In the last screen, click **Finish**.

WFM builds the volumes forecast and the **Scenario Volumes View** reappears, showing your results.

Selecting activities

This is the first screen in the Forecast Volume Build Wizard. The activities you previously selected for the scenario in the New Forecast Wizard Select Activity screen appear for selection.

Use the **Select Activity** screen as follows:

1. Expand business units (if any) to display their sites and multi-site activities, and expand sites to display their activities.
2. Select all of the activities that you want to be included in this volumes forecast.
You can select multiple activities to build volume forecasts in batch mode when configuration information for each activity is identical. If you want to use different historical data or build methods for certain activities, build the volumes for those activities separately.
If you selected an existing forecast instead of None> 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.
Note that you can add activities to a forecast after it has been created.
3. Click **Next** to continue.
The next wizard screen, Select Data Build Method, opens.

Selecting the data build method

Use the **Select Data Build Method** screen in the Volume Build Wizard to define how you want to build your volumes data.

1. Select the statistic(s) you want from the **Forecast** drop-down list:
 - **Interaction Volume and AHT**
 - **Interaction Volume**
 - **AHT**

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2. Under **Target Dates**, select the date range for the forecast data. The date range cannot be outside the scenario date range.
 3. Select one of the following forecast build methods (see definitions below):
 - Template Based
 - Expert Average Engine
 - Universal Modeling Engine
 - Copy Historical Data
 - Use Value
 4. Click **Next** to open the wizard's next screen.

Build methods explained

The following sections explain the various build methods that are available:

Template Based

The default selection. For detailed information about templates, and instructions on how to create them, see Forecast Templates List View. With template-based forecasting, you can build a forecast using preconfigured interaction volume and/or average handling time (AHT) templates.

You also can have the template-based forecasting engine apply the percentage growth rate to historical data.

Template-based forecasting is best used by contact centers with very stable interaction patterns or for activities that can be manually forecast, such as back-office work, media interactions, or outbound campaigns.

If you select **Template Based**, after you click **Next**, the screen that opens depends on the Forecast type selected at the top of the Select Data Build Method screen.

- **Interaction Volume and AHT**—The Load Interaction Volume Forecast Templates screen opens.
- **Interaction Volume**—The Load Interaction Volume Forecast Templates screen opens.
- **AHT**—The Load Average Handling Time Forecast Template screen opens.

Expert Average Engine

This method uses the statistical analysis of historical data to produce day-of-week, weekly, and (if sufficient historical data exists) yearly trend patterns.

The Expert Average Engine (EAE) requires at least one full week of historical data. For high-quality day-of-week and weekly results, Genesys recommends that you use a minimum of six weeks' worth of data.

This engine applies events in a linear fashion, and this linear perspective smooths out the impact of events across the forecast. Therefore, this engine is best suited to contact centers with fairly stable interaction patterns.

If you select **Expert Average Engine**, after you click **Next**, the Select Historical Data screen opens. If a selected activity does not have historical data, an error message appears and the Select Historical Data screen does not open.

Universal Modeling Engine

This method uses a complex algorithm to identify trends and patterns in historical data, which it then uses to create a forecast.

The Universal Modeling Engine (UME) requires one year's worth, or more, of historical data.

This engine is configured so that, in its analysis of historical data, it disregards days that contain special events, if those events don't occur during the forecast period. This configuration eliminates misleading *noise* from the forecasts. However, if a special event does occur during the forecast period, the UME uses the historical data to calculate the impact of the event and applies it to the baseline forecast. The UME is best suited to sites with a large quantity of high-quality historical data.

If you select **Universal Modeling Engine**, after you click **Next**, the Select Historical Data screen opens. If a selected activity does not have historical data, an error message appears and the Select Historical Data screen does not open.

Copy Historical Data

Appropriate selection if you have some historical data, but not enough to use the Expert Average or Universal Modeling engines. You can combine the historical data with overlap templates, which fill in gaps in the historical data.

If you select **Copy Historical Data**, after you click **Next**, the Select Historical Data screen opens. If a selected activity does not have historical data, an error message appears and the Select Historical Data screen does not open.

Use Value

Appropriate selection if your site activity load is very regular. Applies a specific interaction volume or AHT to each time interval in the scenario.

If the Forecast type is Interaction Volume and AHT, selecting **Use Value** enables both the **IV** and **AHT** fields.

If the Forecast type is Interaction Volume, only the **IV** field is enabled.

If the Forecast type is AHT, only the **AHT** field is enabled.

1. Enter the appropriate value(s) to be used for each cell in the forecast:
 - For IV, enter the number of interactions per time step (example: number of interactions per 15-minute interval).
 - For AHT, enter the number of seconds that represents average handling time.
2. Click **Finish**.

WFM builds the volumes forecast and the Scenario Volumes view reappears, showing your results.

Selecting historical data

Use the **Select Historical Data** screen in the Volumes Build Wizard (VBW) to define the historical data time range with the option of using overlap templates. If you selected the **Copy Historical Data** method, this screen includes a **Growth Rate** field.

The Wizard brings up this screen if the build method is **Expert Average Engine**, **Universal Modeling Engine**, or **Copy Historical Data**.

1. Select the **Start date** of the historical data that you want to use.
 - Select the same day of the week as the forecast scenario's first day. For example, if the target start date is a Tuesday, the historical data Start Date must also be a Tuesday.

2. Select the **End date** of the historical data.

If you selected Copy Historical Data on the Select Data Build Method screen, this field is disabled. If the End date field is enabled:

- You can select a date range as short as one day, or as long as the forecast scenario for which you are building data.
- The same historical start and end dates are used for all activities selected in the Select Activities screen.

Remember that redistributing events do not impact historical data, only the forecast.

3. If the build method is **Expert Average Engine** or **Universal Modeling Engine**, you can add additional historical periods to the list, to specify the exact historical data that you wish to be used (and ignore any data that you wish not to be used).
 - Click **Add** to add a new row in the **Use Historical Data** area.
 - Highlight a row in the **Use Historical Data** area and click **Delete** to remove that row.

Multiple rows cannot overlap.

4. If you selected the **Copy Historical Data** method on the previous screen, enter a number in the **Growth Rate** field. This optional field allows you to increase or decrease the historical data by a specified percent. The value cannot be less than -100%.
5. The next series of screens depends on the build method and whether you clicked the **Use Overlap Template** check box. For example:
 - If the build method is **Copy Historical Data** and you are not using an overlap template, click **Finish**.
 - If the build method is **Copy Historical Data** and you are using an overlap template, click **Next** to bring up a screen for selecting templates.
 - If the build method is **Expert Average Engine** or **Universal Modeling Engine**, the next screen depends on whether you want to use an overlap template.
 - If you did not check the **Use Overlap Templates** box, click **Next**. The Select Events screen opens.
 - If you checked the **Use Overlap Templates** box, click **Next** to bring up a screen for loading templates.

Selecting templates

The Volumes Build Wizard provides the option of using one of four template types. The following sections explain the various forecast template screens:

Interaction volume templates

The **Load Interaction Volume Forecast Templates** screen opens if you selected the following in the Select Data Build Method screen:

Forecast = Interaction Volume and AHT or Interaction Volume.

Methods = Template Based.

1. Select a template from the **Templates** list on the left.
1. Select **Start** and **End dates** for the template.
2. Check days of the week boxes to indicate when the template should be applied.
3. Click the >>> button.
If you change your mind, click the **button**.
4. If the Forecast type was **Interaction Volume and AHT**, click **Next**.
The Load Average Handling Time Forecast Template screen opens and you must complete that screen.
If the Forecast type was Interaction Volume, the Finish button becomes enabled.
5. Click **Finish**.
WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

An error message appears if WFM Web cannot complete the calculation (for example, if historical data contains too few timesteps to cover the scenario's activity hours). This applies to all the template types discussed in this topic.

Average handling time templates

The **Load Average Handling Time Forecast Templates** screen opens if you selected the following in the Select Data Build Method screen:

Forecast = AHT or Interaction Volume and AHT. (If Interaction Volume and AHT is selected, the window appears after clicking Next in the Load Interaction Volume Forecast Templates screen shown above.)

Methods = Template Based.

Except for the title and content of the templates list, the screen appears identical to the **Load Interaction Volume Forecast Templates** screen.

1. Select a template from the **Templates** list on the left.
2. Select **Start** and **End dates** for the template.

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3. Check days of the week boxes to indicate when the template should be applied.
 4. Click the >>> button.
If you change your mind, click the button.
 5. Click **Finish**.
WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

Interaction volume overlap templates

Assume there is some bad data in the historical data. One way to compensate for this is to build an overlap template.

The **Load Interaction Volume Forecast Overlap Templates** screen opens if you selected **Use Overlap Template** in the Historical Data screen and previously selected the following in the Select Data Build Method screen:

Forecast = Interaction Volume and AHT or Interaction Volume.

Methods = Copy Historical Data, Expert Average Engine, or Universal Modeling Engine.

Except for the title, content of the templates list, and day of the week check boxes, the screen appears identical to the **Load Interaction Volume Forecast Templates** screen.

1. Select an overlap template from the **Templates** list on the left.
2. Select **Start** and **End dates** for the overlap template.
3. Click the >>> button.
If you change your mind, click the **button**.
4. If the Forecast type was **Interaction Volume and AHT**, click **Next**.
The Load Average Handling Time Forecast Overlap Template screen opens (described below) and you must complete that screen.
If the Forecast type was Interaction Volume, the Finish button becomes enabled.
5. Click **Finish**.
WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

Average handling time forecast overlap templates

The **Load Average Handling Time Forecast Overlap Templates** screen opens if you selected **Use Overlap Template** in the Historical Data screen and previously selected the following in the Select Data Build Method screen:

Forecast = AHT or Interaction Volume and AHT. (If Interaction Volume and AHT is selected, the screen appears after clicking Next in the Load Interaction Volume Overlap Forecast Templates screen.)

Methods = Copy Historical Data, Expert Average Engine, or Universal Modeling Engine.

Except for the title, contents of the templates list, and day of the week check boxes, the screen appears identical to the **Load Interaction Volume Forecast Templates** screen.

1. Select an overlap template from the **Templates** list on the left.
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2. Select **Start** and **End dates** for the overlap template.
 3. Check days of the week boxes to indicate when the overlap template should be applied.
 4. Click **Finish**.
WFM builds the volumes forecast and the Scenario Volumes View reappears, showing your results.

Selecting events

Use the Select Events screen in the Volumes Build Wizard (VBW) to factor events into a Forecast Volumes scenario.

Prerequisite: You must create events in the Forecast > Overlays module, and assign them to activities there, before you can add those events to a forecast scenario

- An overlay is anything that can be expected to affect the daily interaction volume of the enterprise and, therefore, staff and schedule requirements.
- An event is a specific instance when an overlay is in effect.

To add events:

1. Select the **Enabled** check box for the events that you want to include.
Alternatively, you can select the **Use All Applicable** check box to use all applicable events, whether the **Enabled** check box is selected or cleared.
2. If you are using the Universal Modeling Engine, this is all you need to configure. Click **Finish**.
3. If you are using the Expert Average Engine you can also, optionally:
 - a. Enter a **Spread Over** value for each event.
This determines the period that the event affects.
 - b. Click **Days** or **Hours**.
This determines whether the **Spread Over** value is interpreted as days or hours.
 - c. Adjust the **Initial Impact** and/or **Ending Impact** value, if appropriate.
(The default values are based on the event's configuration. If the event is configured to disregard historical data, you cannot adjust these values here. You must change the configuration using the Overlays module.)
 - d. Click **Distribution** to view and optionally change the distribution method of the selected overlay.
 - e. Check the **Use All Applicable** check box if the forecast build algorithm should use all events or overlays applicable to the selected activities that fall into the scenario/historical data date range.
When checked, disables the fields and controls that appear above.
 - f. Click **Finish**.

WFM Web calculates the volumes and displays them in the Volumes view. An error message appears if WFM Web cannot complete the calculation (for example, if the historical data contains too few timesteps to cover the scenario's activity hours).

Important

Redistributing events does not impact historical data, only the forecast.

Selecting events distribution

Use the Select Events Distribution screen in the Volumes Build Wizard (VBW) to view and optionally change the distribution method of the selected overlay in a Forecast Volumes scenario.

Tip

The functionality on this page duplicates the Distribution tab of the Overlays page, if **Always Use Entered Distribution** was selected on the **Properties** tab of that page.

- **Graph**—Displays the same information as the grid below it displays, but in graphical form.
- **Grid**—Displays and allows you to edit the overlay's distribution in the following columns:
- **Daily or Hourly Impact**—Each row displays an increment during which the overlay will be in effect. The actual increment (Day or Hour) is configured in Spread.
- **Distribution Value**—Displays the distribution value of each increment. The default value in each cell is 0.
 - If the selected overlay is of the type impacting, then you can enter values from -100 to 9999 into the grid.
 - If the selected overlay is of the type redistributing, then you can enter values from 0 to 100 into the grid.

Important

If the total of all values in the grid does not equal 100, you will see a warning and will not be able to save your changes to the overlay.