This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Workforce Management Supervisor Help

Managing templates

5/19/2026

Contents

- 1 Creating forecast templates
  - 1.1 Creating a forecast template
- 2 Creating templates based on existing data
  - 2.1 Creating a template based on an existing data
- 3 Editing templates
  - 3.1 Editing a forecast template
- 4 Deleting templates
  - 4.1 Deleting a template
  - 4.2 Deleting multiple templates
  - 4.3 Deleting all templates in the table
- 5 Filtering templates in the table
  - 5.1 Filtering templates in the table
- 6 Selecting data to copy and paste
  - 6.1 Shift+arrow keys
  - 6.2 Arrow keys
  - 6.3 Shift+Home, Shift+End
  - 6.4 Home, End keys
  - 6.5 Shift+Page Up, Shift+ Page Down
  - 6.6 Page Up, Page Down
  - 6.7 Ctrl+A
  - 6.8 Drag mouse or mouse pad
  - 6.9 Shift+ mouse-click
  - 6.10 Ctrl-C, Ctrl-V

Learn how use forecast templates to create forecasts for sites or business units that have little or no historical data.

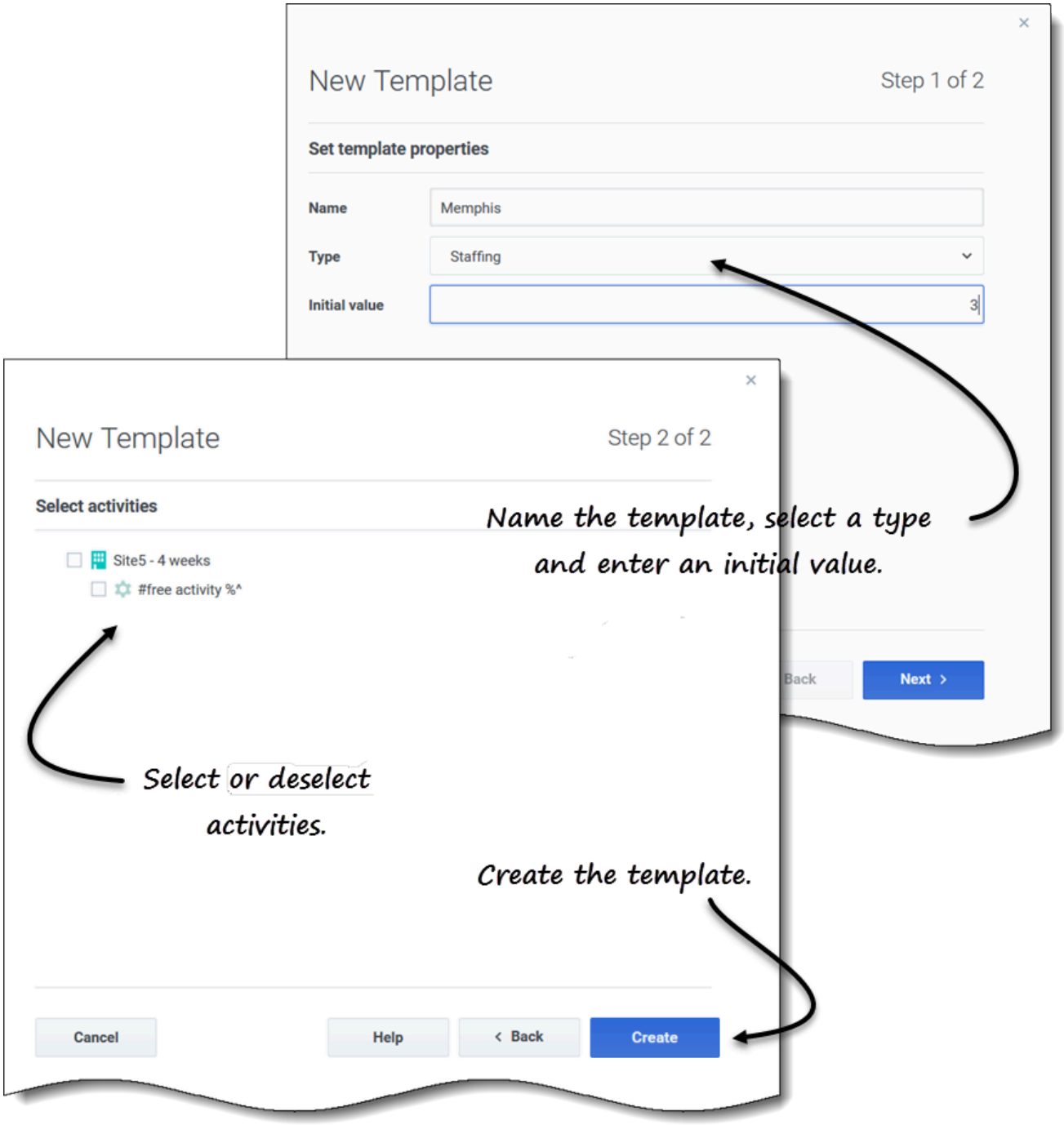
Related documentation:

-

This topic describes the Workforce Management (WFM) wizards, controls, and settings you'll use to view, create, and manage forecasting templates.

The templates you create using these procedures can be used only for the activities or multi-site activities (MSA) you select in Step 2 of wizards. If you select any other activity or MSA, you won't see the template.

Creating forecast templates



Creating a forecast template

1. In the **Forecast** > **Templates** view, select:
   - A business unit if you are creating the template for multi-site activities.
   - A site if you are creating the template for activities.

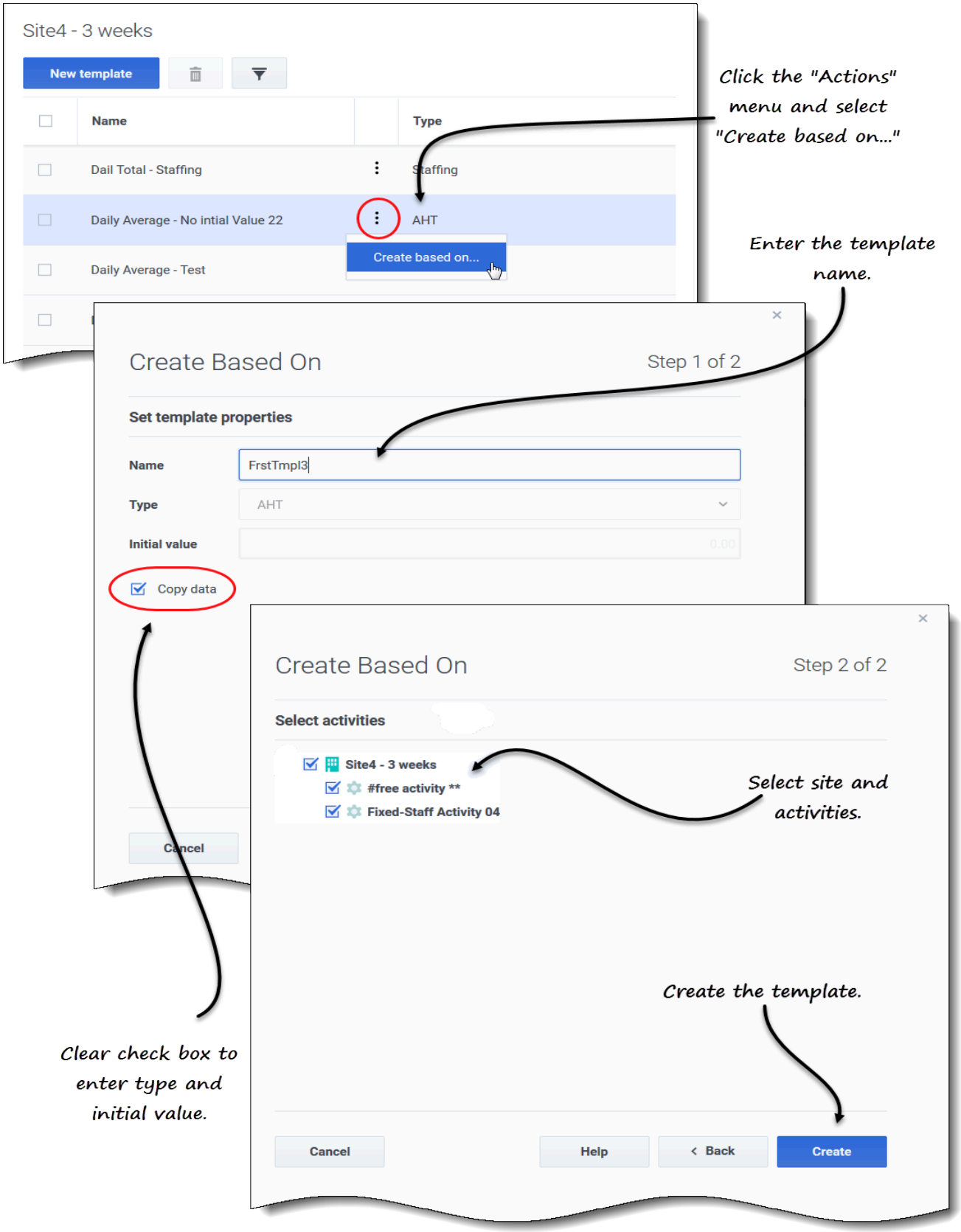
2. Click **New template**.
   Step 1 of the New Template dialog opens.
3. Enter a **Name** for the template (limited to 127 characters)
4. Select the template type from the **Type** drop-down list.
   See a list of template types here.
5. Enter a number in the **Initial value** text box.
   See the Tip below for more information.
6. Click **Next**.
7. In Step 2 of the dialog, select the activities or multi-site activities for this template.
8. Click **Create**.
9. When the confirmation message appears, click **OK**.
   Your template displays in the list of templates.

> ### Tip
> The initial value is a minimum value that applies to all timesteps. After you've created the template, edit it to adjust the precise values for each timestep.
>
> WFM Web interprets the initial value differently, depending on the type of template you choose. For example, templates of type **IV** (interaction volume) could have an initial value between `0` and 9999999 (calls per timestep). However, templates of type **Maximum occupancy** could have an initial value between `0.01` and `100.00` percent.
>
> For more information about all acceptable values, see Acceptable values in templates.

Creating templates based on existing data

Use the Create Based On dialog to create a new forecast template from existing data.

When creating templates using this dialog, you'll notice (in Step 1) that the Type and Initial value fields are disabled and the Copy data check box is checked, by default. WFM assumes that you want to use the same data that was used in the source template. If you don't want to, simply uncheck the Copy data check box and change the template type and/or initial value.


Site4 - 3 weeks
New template
Name
Type
Dail Total - Staffing
Staffing
Daily Average - No intial Value 22
AHT
Create based on...
Daily Average - Test
Click the "Actions" menu and select "Create based on..."
Enter the template name.
Create Based On
Step 1 of 2
Set template properties
Name
FrstTmpl3
Type
AHT
Initial value
Copy data
Cancel
Create Based On
Step 2 of 2
Select activities
Site4 - 3 weeks
#free activity **
Fixed-Staff Activity 04
Select site and activities.
Create the template.
Clear check box to enter type and initial value.
Cancel
Help
Back
Create

Creating a template based on an existing data

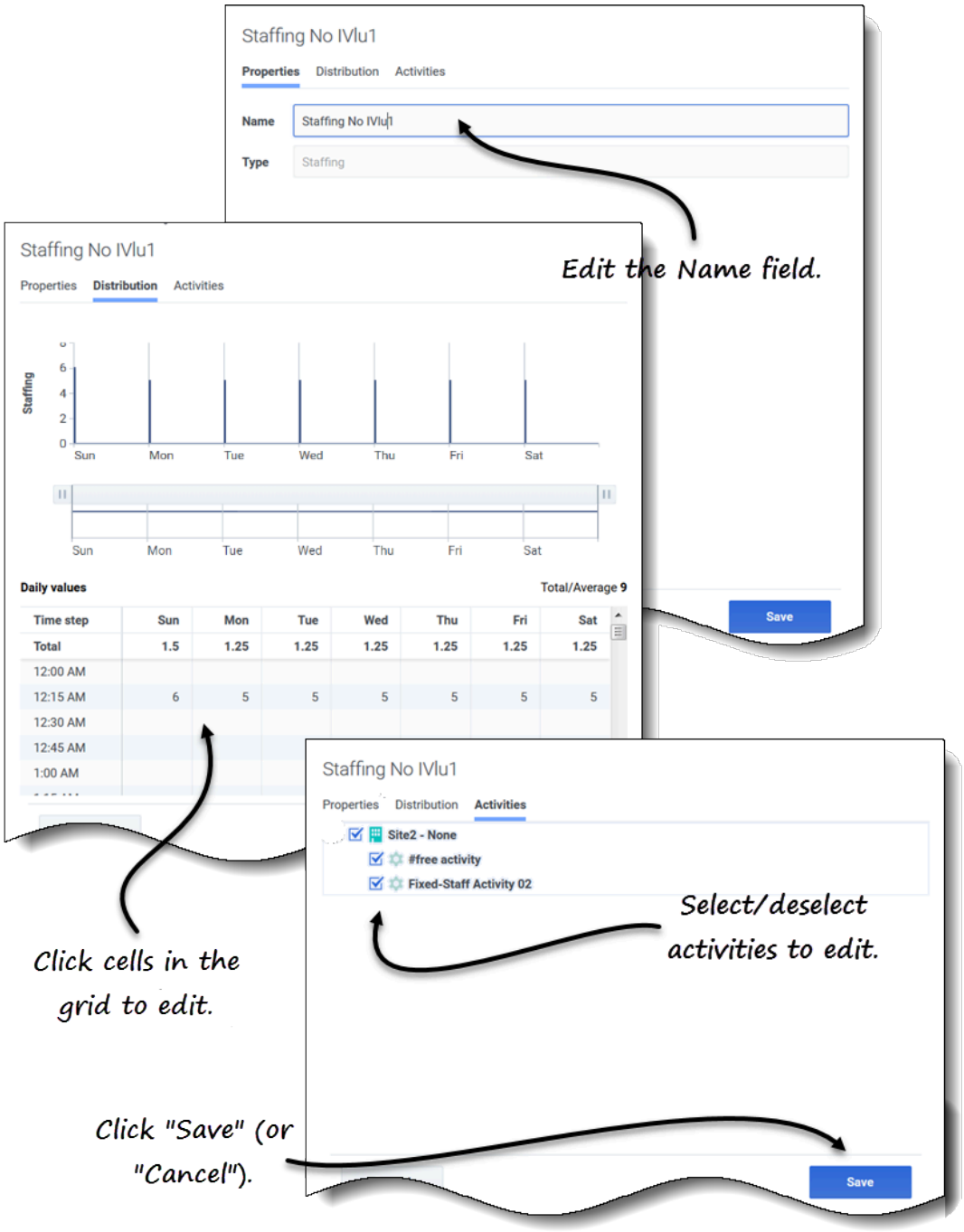
1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. Choose a template, click **Actions** ⋮, and select **Create based on...**.
3. In Step 1 of the dialog, in the **Name** field, enter the template name (limited to 127 characters).
4. In the **Type** drop-down list, select the template type.
   See a list of template types here.
5. Enter a number in the **Initial value** field.
   See the Tip above for more information.
6. Remove the check mark in the **Copy data** check box if you do not want to copy data from the source (based on) template.
7. Click **Next**.
8. In Step 2 of the dialog, select the activities or multi-site activities for this template.
9. Click **Create**.
10. When the confirmation message appears, click **OK**.
    Your template displays in the list of templates.

Editing templates

In the Template Distribution grid, you can move from cell to cell by using the Enter or Shift+Enter keys on the keyboard. Click a cell and press:

- the Enter key to move the focus to the cell below the one selected.
- the Shift+Enter keys to move the focus to the cell above the one selected.

If you select a cell in the **Total** or **Average** row, you can use Enter to move down one cell, but you cannot use Shift+Enter to move up one cell.


Staffing No IVlu1
Properties
Distribution
Activities
Name
Staffing No IVlu1
Type
Staffing
Save
Edit the Name field.
Staffing No IVlu1
Properties
Distribution
Activities
Staffing
6
4
2
0
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Daily values
Total/Average 9
Time step
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Total
1.5
1.25
1.25
1.25
1.25
1.25
1.25
12:00 AM
12:15 AM
6
5
5
5
5
5
5
12:30 AM
12:45 AM
1:00 AM
Click cells in the grid to edit.
Staffing No IVlu1
Properties
Distribution
Activities
Site2 - None
#free activity
Fixed-Staff Activity 02
Select/deselect activities to edit.
Click "Save" (or "Cancel").
Save

Editing a forecast template

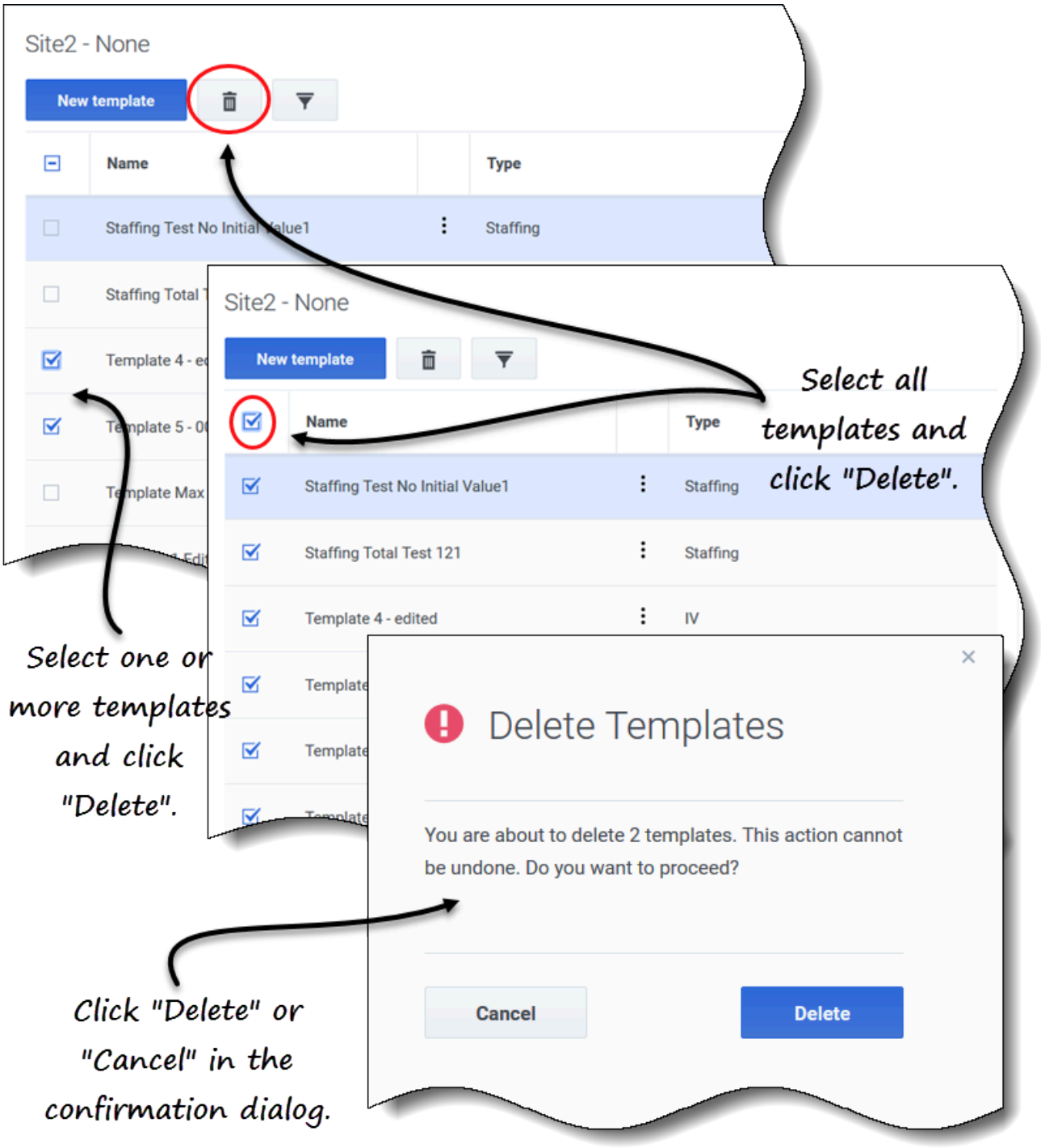
1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. In the table, select the template you want to edit.
   The Data pane opens, displaying 3 tabs.
3. Click any tab to change its settings:
   - In the **Properties** tab, enter a different name for the template. Note that you cannot change the **Type**.
   - In the **Distribution** tab, click any cell in the table to change its value. The **Total/Average** values change to reflect any changes you make to the cell values and vice versa.
   - In the **Activities** tab, add or remove activities by checking or clearing the check box next to the activity.
4. When you are finished editing, click **Save**.
   Alternatively, click Cancel at any time to discard any changes you've made.

When you are editing values in the Distribution grid, you can click the **Esc** key to cancel the action (WFM does not change the value).

If you select a business unit or site but do not select a template in the table, you'll see the message *Select template to edit* in the **Data** pane.

See also, Selecting data to copy and paste.

Deleting templates


Site2 - None
New template
Name
Type
Staffing Test No Initial Value1
Staffing
Staffing Total Test 121
Staffing
Template 4 - edited
IV
Select all templates and click "Delete".
Select one or more templates and click "Delete".
Delete Templates
You are about to delete 2 templates. This action cannot be undone. Do you want to proceed?
Cancel
Delete
Click "Delete" or "Cancel" in the confirmation dialog.

Deleting a template

1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. In the table, select the template that you want to delete.
3. In the toolbar, click **Delete** .

1. When the confirmation dialog opens, click **Delete** to proceed or **Cancel** to cancel the action.

Deleting multiple templates

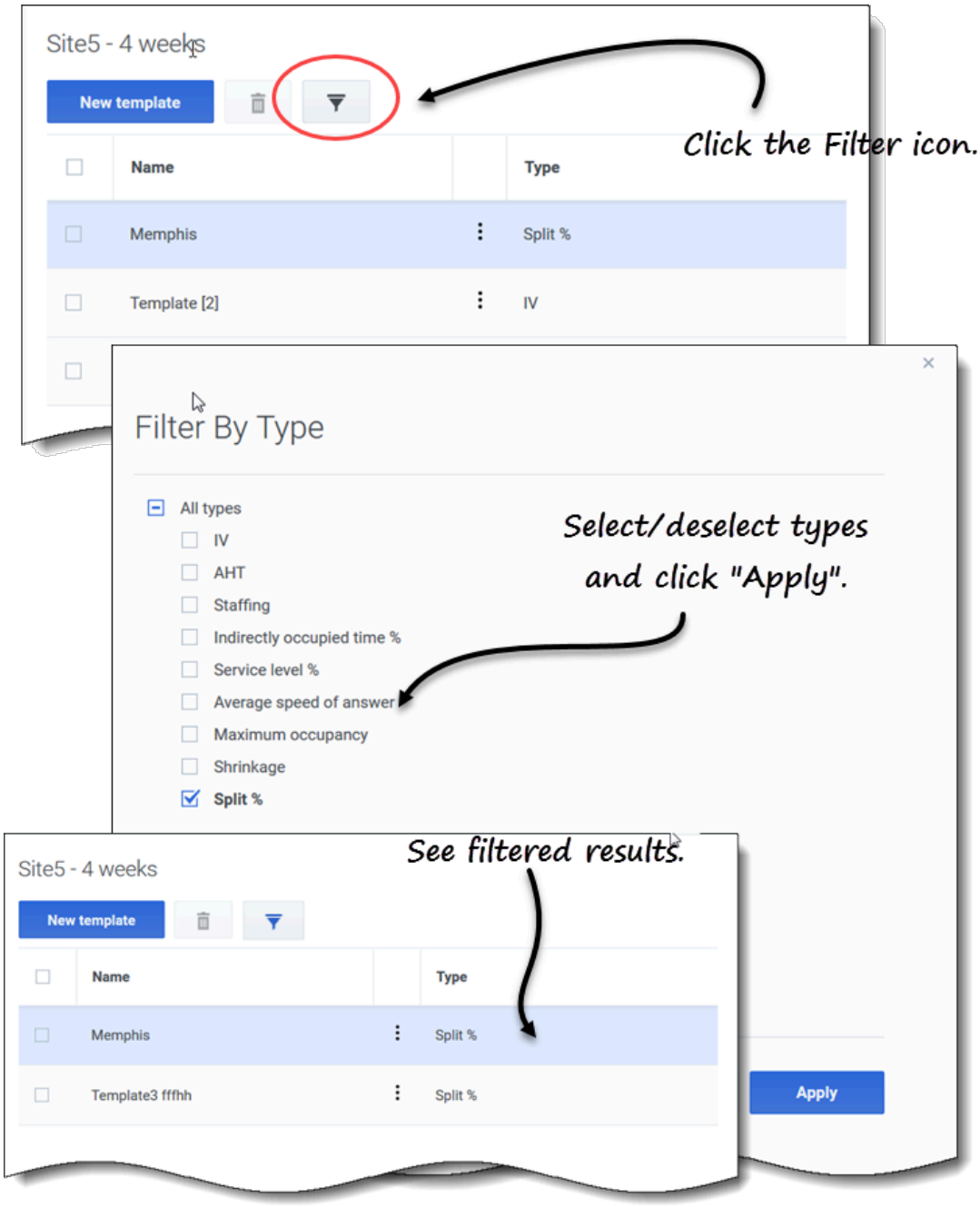
1. Select the templates you want to delete (using the check box beside each template).
2. Complete steps 3 and 4 in Deleting a template.

Deleting all templates in the table

1. Select the top-most check box in the column header (near the **Name** column header).
2. Complete steps 3 and 4 in Deleting a template.

If you are deleting a single template, the confirmation dialog contains the template name. If you are deleting multiple templates, the confirmation dialog states the number of templates being deleted.

Filtering templates in the table


Site5 - 4 weeks
New template
Name
Type
Memphis
Split %
Template [2]
IV
Click the Filter icon.
Filter By Type
All types
IV
AHT
Staffing
Indirectly occupied time %
Service level %
Average speed of answer
Maximum occupancy
Shrinkage
Split %
Select/deselect types and click "Apply".
Apply
See filtered results.
Site5 - 4 weeks
New template
Name
Type
Memphis
Split %
Template3 fffhh
Split %

Filtering templates in the table

1. In the **Forecast** > **Templates** view, select a business unit or site.
   The templates for this object are displayed in a table.
2. In the **Templates** toolbar, click **Filter** .
   The Filter By Type dialog opens with all templates types selected by default.
3. Deselect any template types you do not want to see in the list and click **Apply**.

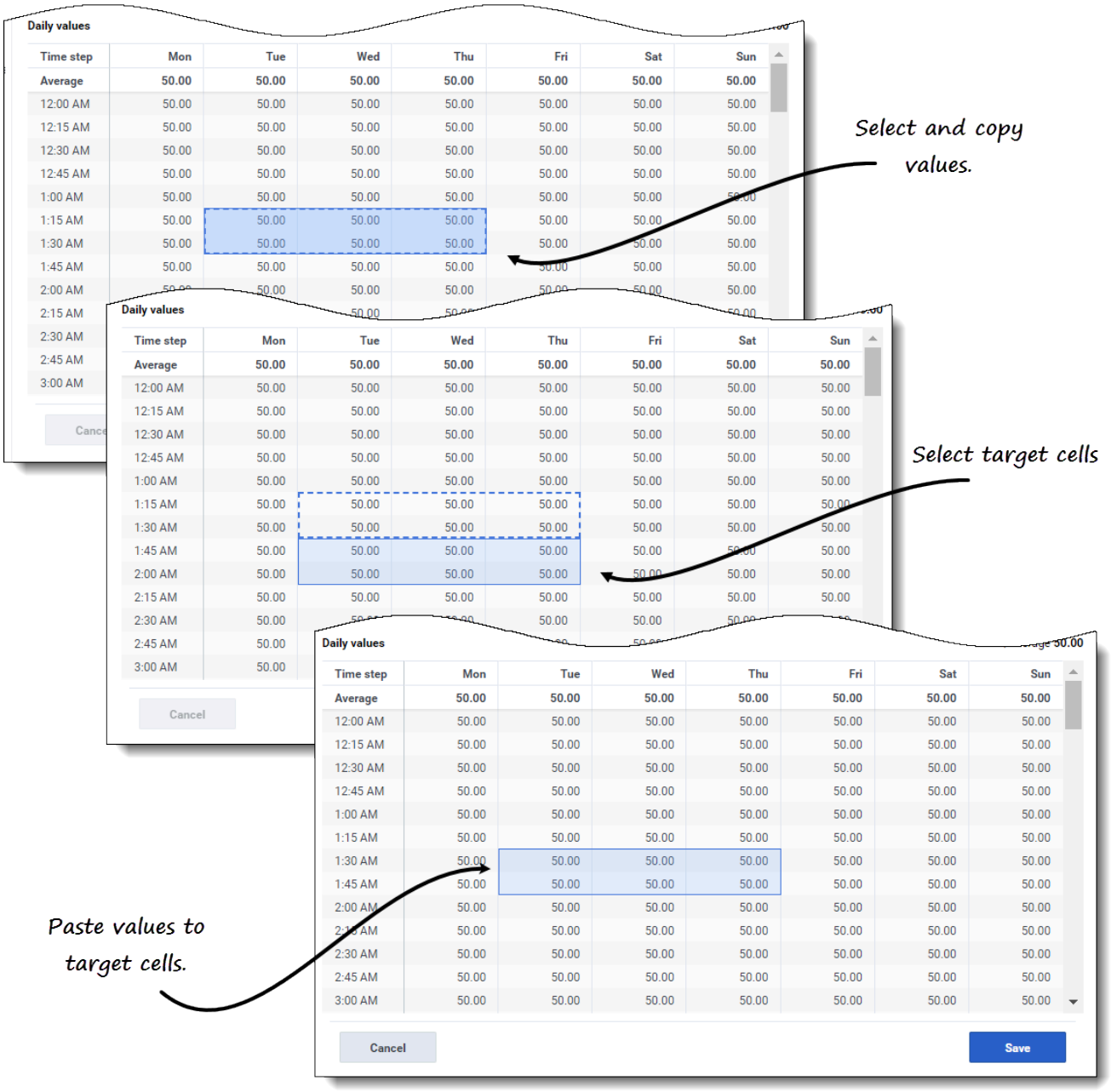
When WFM displays the filtered list of templates, the color of the **Filter** icon changes to blue. If you then select all template types and click **Apply**, the **Filter** icon changes to black.

If there are no templates found of the type you are filtering, you'll see the message *No items to display*.

WFM preserves your filtered selections if you navigate to another view and return to the **Templates** view.

Selecting data to copy and paste

> **Tip**
> If you are unable to copy/paste, ask your administrator to confirm that HTTPS secure connections to WFM are being used in your environment.



You can use key combinations on the keyboard and mouse to select data in the **Template** view's Distribution grid for copying and pasting. You can copy/paste within the grid and to/from a document (for example, Excel or NotePad).

For some key combinations, you must select the **Daily values** row and the **Timestep** column separately. They cannot be selected with other rows or columns in the grid. Also, timestep values can be pasted only to external sources (not into the grid). You cannot select, copy, or paste the Timestep header row (Mon , Tue. etc.).

When selected, cells are highlighted and bordered with a bold solid line. When copied to the

clipboard, they are bordered with a dashed or broken line. Targeted or pasted cells are highlighted and bordered with a bold solid line.

The grid scrolls automatically when you select a range of cells using the Arrow, Home, End, Page Up, or Page Down key, or the Shift+Arrow, Shift+Home, Shift+End, Shift+Page Up, or Shift+Page Down keys.

Attempts to paste any of the following invalid values into the grid or **Daily totals/Average** row results in the message *Cannot paste invalid values:*

- Letters, special symbols, or negative values
- Decimal values for IV
- Values containing more than 9 digits for IV or Staffing
- Values that are out of range.

Shift+arrow keys

Click a cell in the grid and press:

- Shift+up arrow key to select additional cells above the selected cell.
- Shift+down arrow key to select additional cells below the selected cell.
- Shift+right arrow key to select additional cells to the right of the selected cell.
- Shift+left arrow key to select additional cells to the left of the selected cell.

Arrow keys

Click a cell in the grid and press:

- The up arrow key to select the cell immediately above it.
- The down arrow key to select the cell immediately below it
- The right arrow key to select the cell immediately to the right of it.
- The left arrow key to select the cell immediately to the left of it.

Click a range of cells in the grid and press:

- The up arrow key to select the cell immediately above the last cell in the range.
- The down arrow key to select the cell immediately below the last cell in the range.
- The right arrow key to select the cell immediately to the right of the last cell in the range.
- The left arrow key to select the cell immediately to the left of the last cell in the range.

Shift+Home, Shift+End

Click a cell in the grid and press:

- Shift+Home to select additional cells to the left of the selected cell.
- Shift+End to select additional cells to the right of the selected cell.

This key combination has no effect on **Time step** column.

Home, End keys

Click a cell or range of cells in the grid and press:

- The Home key to select the first cell in that row.
- The End key to select the last cell in that row.

Shift+Page Up, Shift+ Page Down

Click a cell in the grid and press:

- Shift+Page Up to select all cells above the selected cell.
- Shift+Page Down to select all cells below the selected cell.

This key combination has no effect on **Daily values** row

Page Up, Page Down

Select cells in the grid, and press:

- Page Up to select the first cell in that column within the visible grid area.
- Page Down to select the last cell in that column within the visible grid area.

Clicking these keys selects only the cells within the visible area of the grid. Click these keys more than once to select cells beyond the visible area.

Select a range of cells in the **Daily totals** row and press:

- Page Up to select the first cell within the selected range.
- Page Down to select the last cell within the selected range.

Ctrl+A

- Click any cell in the grid and press Ctrl+A—All cells in the grid are selected.
- Click any cell in the **Timestep** column and press Ctrl+A—All cells in the column are selected.
- Click anywhere in the **Daily totals/Average** row and press Ctrl+A—The entire row is selected.

Drag mouse or mouse pad

- Click any cell in the grid and hold down the right mouse key while dragging the mouse right, left, up,

down, or any combination of directions. The range of cells is selected.

- Click any cell in the **Time step** column and hold down the right mouse key while dragging the mouse up or down. The range of cells in the column is selected.
- Click anywhere in the **Daily values** row and hold down the right mouse key while dragging the mouse left or right. The entire row is selected.

When dragging the mouse, if cells are selected beyond the visible area of the grid, the grid adjusts and autoscrolls to display the selected cells.

Shift+ mouse-click

- Hold down the Shift key and click any cell in the grid. Using the mouse, click anywhere in the grid in any direction. The range of cells is selected.
- Hold down the Shift key and click any cell in the **Time step** column. Using the mouse, click anywhere in the column, up or down. The range of cells is selected.
- Hold down the Shift key and click anywhere in the **Daily totals/Average** row. Using the mouse, click anywhere in the column, right or left. The entire row is selected.

Ctrl-C, Ctrl-V

Select cells in the grid, and press:

- Ctrl-C to copy values in the grid. The message *Copied to clipboard* appears. Click **X** to close it.
- Crtl-V to paste values in an Excel spreadsheet or a text editor such as, NotePad.

If more cells are copied than there are cells to paste into, WFM extends the number of cells/column/rows to accommodate the data being pasted.