Workforce Management Supervisor Help

Required and split staffing methods

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Contents

Set the required staffing values and learn how to split multi-site activities staffing data between its associated activities.

Related documentation:

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Workforce Management (WFM) provides different methods to staff (define the number of agents required for) forecast scenarios, such as Required and Split Staffing.

Required staffing is a user-defined data series that you build, by using the Required Staffing wizard. The Split Staffing wizard enables you to split the number of agents required for a multi-site activities (MSA) into specific amounts for each activity within the MSA.

Using required staffing values

Use the **Required Staffing** wizard to define required staffing values in a forecast scenario's Staffing view.

Here's what you should know about required staffing and how you can use it:

- Required staffing data is user-defined staffing requirements for a forecast scenario.
- If you have compiled calculated-staffing values, you can set required staffing to the same values as calculated staffing.
- Forecasts can contain both calculated and required data. You can build schedules by using either set of data.
- Required staffing can be composed of a combination of template values, manually entered amounts, and calculated staffing values.

> ### Tip
> Before selecting the template in this wizard, create templates as needed.

Required Staffing

Select build method

○ Load calculated staffing

○ Load calculated staffing adjusted by   10%

● Load calculated staffing adjusted using shrinkage | 1 selected   ✕ | ✏

○ Use templates | Select... | ✏

Click "Edit" here to open this dialog.

Click "Edit" here to open this dialog.

Load

Select shrinkage profiles

	Name	Type
☑	Planned	Working overhead
☐	Unplanned	Non working overhead

Check this check box to select all profiles.

Cancel

Select Template

Add or remove templates   **Add template**

✕ | Select template   ⌄ |

Start date | Mon, 1 Jan 2018 📅 | ↕   **End date** | Mon, 31 Dec 2018 📅 | ↕   365 day(s)

☑ Sun ☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☑ Sat

Deselect the check box beside the days that are not applicable.

Click this down-arrow to open a drop-down list of templates names for selection.

Cancel   **OK**

Setting the required staffing

1. In the navigation bar, click **Forecast** > **Scenarios**.
   The Scenarios view opens.

2. Beside the scenario you want to staff, click **Actions** ⋮ and then, select **Open**.

3. At the top, near the scenario name, click the **Volumes** drop-down menu and select **Staffing**.

4. In the **Activities** pane, select an activity or multi-site activity and click **Required** 👤.
   The Required Staffing wizard opens.

5. Choose one of four build methods:

   • **Load calculated staffing**

   • **Load calculated staffing, adjusted by**

   • **Load calculated staffing adjusted using shrinkage**

   • **Use templates**

• Select **Load calculated staffing** to apply calculated staffing to required staffing with no changes.

• Select **Load calculated staffing, adjusted by** and enter a percentage to adjust calculated staffing before applying it to required staffing. Valid values are from -99 to 999.

• Select **Load calculated staffing adjusted using shrinkage** and click **Edit** ✏️ to adjust calculated staffing, before applying it to required staffing.

   1. When the **Select shrinkage profile** dialog opens, select the check box beside the profiles you want to use, or select the top-most check box to select all profiles.

   2. Click **OK** to return to the **Required Staffing** dialog.
      The Load calculated staffing adjusted using shrinkage field is updated with the number of profiles you selected.

• Select **Use templates** and click **Edit** to apply one or more staffing templates

   1. When the **Select Template** dialog opens, click the down arrow in the empty field to select a template.

   2. To add another template, click **Add template**.

   3. For each template, enter a start and end date, or use the date selectors to set these fields.

   4. Deselect the check boxes for the week days that are not applicable.

   5. Click **OK** to return to
      The Use templates field is updated with the number of templates you selected.

In the **Required Staffing** dialog, click **Load** and when the loading process is complete, click **OK**.

Splitting the staffing data

Use the **Staffing Split Wizard** to split staffing from a multi-site activity (MSA) **Staffing forecast** scenario.

A multi-site activity (virtual activity set) has one or more associated activities (existing activities). After building calculated and required staffing for a multi-site activity, you can then use this wizard to split the result between associated activities.

> ## Tip
> The **Staffing Split Wizard** is available only within a **Forecast Scenario**. You must add a multi-site activity to the forecast scenario for them to be available for splitting in **Staffing Split Wizard**.

Split Staffing — Step 1 of 3

Select multi-site activities to split

- BU_Monday
- BU1 - Sunday
  - Deferred MSA
  - Deferred MSA 2
  - Deferred MSA 3
  - Fixed-Staff Multi-Site Activity
  - ☑ New Multi-Site Activity (1495237885973)
- BU2 - Saturday

If checked, WFM considers AHT forecasts when performing the split.

☐ Use AHT forecast

Cancel

Split Staffing — Step 2 of 3

Select activities within multi-site activities

Select activities.

- ☑ BU1 - Sunday
  - ☑ Site2 - None
    - ☑ #free activity
    - ☑ Fixed-Staff Activity 02
  - ☑ Site5 - 4 weeks
    - ☑ #free activity %^

☑ Split required also

Cancel

Split Staffing — Step 3 of 3

Check top row check boxes and enter values to "Set all" activities at once with the same values.

Specify budgeting data

☑ Working hours   07:00   ☑ Hourly wages $8   Set all

Site	Activity	Working hours	Hourly wage
Site2 - None	#free activity	07:00	$8
Site2 - None	Fixed-Staff Activity 02	07:00	$8
Site5 - 4 weeks	#free activity %^	07:00	$8

Alternatively, enter values for each activity, individually.

Cancel   Help   ‹ Back   Split

If checked, WFM also splits required staffing.

Splitting staffing for a multi-site activity

1. In the navigation bar, click **Forecast** > **Scenarios**.
   The Scenarios view opens.

2. Beside the scenario you want to staff, click **Actions** ⋮ and then, select **Open**.

3. At the top, near the scenario name, click the **Volumes** drop-down menu and select **Staffing**.

4. In the **Activities** pane, select multi-site activity and click **Split** .
   The Split Staffing wizard opens.

5. Using the check box, select the multi-site activity that you want to be split between associated activities.
   You can select several multi-site activities within the same business unit.

6. Select **Use AHT forecast** if you want WFM Web to consider average handling time forecasts when performing the split and then, click **Next**.
   Step 2 of the wizard opens.

Step 2: Selecting activities within MSA

1. At the bottom of the pane, select **Split required also**, if you also want to split required staffing.

2. Select the local (target) activities into which you want to split the multi-site activities.

3. Click **Next**.
   Step 3 of the wizard opens.

Step3: Specify budgeting data

1. If you want each activity to have the same values, in the top row:

   1. Select and enter the **Working hours** (paid hours per day).

   2. Select and enter the **Hourly wages**.

   3. Click **Set all**.

2. If you want activities to have different values, enter **Working hours** and **Hourly wages** for each activity, individually.

3. Click **Split**.
   WFM Web displays a progress dialog while it splits the activities.

4. When the split process is complete, click **OK**.

You can click **Cancel** in this dialog at any time if you want to cancel the split.