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Workforce Management Supervisor Help

Building staffing

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Build staffing data, by defining the number of agents in forecast scenarios.

Related documentation:

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In Workforce Management (WFM), you'll use the **Build Staffing** wizard in the **Scenarios Staffing** view to build staffing data in forecast scenarios for a selected single-site activity or multi-site activity, based on parameters that you provide.

To open this view, click **Forecast > Scenarios**. The **Scenarios** view opens, displaying a list of scenarios in a table. Open a scenario; You'll see the **Volumes** view by default. Switch to the **Staffing** view by clicking the drop-down menu beside the scenario's name.

Before you begin

Before using the **Build Staffing** wizard to build a staffing forecast, take these required actions:

- Use the Build Volumes wizard to build interaction volumes and AHT for activities and/or multi-site activities.
- If you plan to use templates, create them.

Be aware that even if there is IV and AHT data for child activities, this wizard does not build a staffing forecast for the parent multi-site activity.

For information about building staffing forecasts for multiple activities, see Building staffing for multiple activities.

Building staffing data

You must understand the difference between the following types of activities (mentioned in this procedure) so you can enter/choose optimal values for the activity you are staffing:

- **Immediate**—Work activities that are handled by agents immediately, such as voice calls.
- **Deferred**—Backlog activities, such as email, that use special forecasting calculations.
- **Fixed-staff**—Non-CTI activities that do not use Workforce Management service objectives.

In some cases, the **Build Staffing** dialog displays values that were used for the most recent staffing build or the default forecasting objectives values (if these have been specified and there were no previous builds). Otherwise, the parameter values are left blank. You can also save the values of certain parameters as the new default service level objectives (for more information, see Save default service level objectives).

Step 1: Build staffing data

×

Build Staffing

Step 1 of 2

Select target date range and build options

Start date

Sun, Feb 12, 2017

End date

Sat, Feb 18, 2017

7 day(s)

Indirectly occupied time

☒ Use value

☐ Use template

Select...

☐ Save indirectly occupied time in default SL objectives

Preview staffing changes

☐ Compare results against previous

Save default SL objectives:

☐ Append selected

☒ Remove all

Cancel

Help

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Next >

1. In the scenario's **Staffing** view toolbar, click **Build** .
The Build Staffing dialog opens.

2. Enter the target date range in the **Start date** and **End date** fields.
The scenario's start and end date displays, by default.

3. In the Indirectly occupied time section, click one of two radio buttons:

- **Use value**—Enter a value (for example, 0 to 99%).

- **Use template**—Click **Edit** .

Select **Save indirectly occupied time to default SL objectives** if you want to save the value you have specified as the default IOT value.

4. Enter a value in the **Initial queue** field. This option only displays if you are staffing a deferred or multi-site activity.
Select the **Save initial queue time in default SL properties** if you want to save the value that you have specified as the new default service level value.

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5. Select one of the save options for the **Save default SL objectives** setting. This setting only displays if you are staffing an immediate single or multi-site activity. For more information, see Save default service level objectives.
 6. Select **Compare results against previous** if you want to compare this staffing build with an existing one. Otherwise, leave the check box as is.
 7. Click **Next**.

Step 2 of the dialog opens.

Selecting templates

When the **Select Templates** dialog opens:

- Select a template by clicking the down arrow in the name field.
- Enter the start and end dates or click the calendar icon to select them.
- Remove the check mark from the days of the week that are not applicable to this template.
- Click **Add template** to add more templates, if necessary.
 - If there are no templates available you must create them. See Before you begin.
- Click **OK**.

Step 2: Choose a method

Build Staffing

Step 2 of 2

Select build method

Service requirements

Staffing requirements

Update default SL objectives

☒ Use service level objective answered in sec 60
 ☒

☒ Immediate work 20%
 ☐ Use template Select...

☒ Use average speed of answer objective
 ☐

☒ ASA in sec 40
 ☐ Use template Select...

☒ Use estimated average time to abandon in sec 30
 ☐

☐ Use abandoned interaction objective

Cancel

Help

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Build

The settings you see in the **Build Staffing** wizard Step 2 depend on the type of activity you are staffing.

- If you are staffing:
 - An Immediate activity, select the build method. See either Defining service requirements or Defining staffing requirements.
 - A Deferred activity, see Defining multimedia service level objectives.
 - A Fixed-staff activity, see Defining staffing requirements.
- Fill in each screen that opens, and then click **Finish**.
- If you selected Compare results with previous in Step 1 of the **Build Staffing** dialog, the **Scenario Build Results** window opens.

Next step:

- Publish the scenario to the Master Forecast. For details, see Publishing the forecast scenario.

Defining service requirements

If you select **Service requirements** for the build method in the **Build Staffing** wizard, use the following settings to define service level objectives when staffing Immediate activities. When you select an objective's check box, you enable the text boxes for these target levels.

In some cases, you might want to use a template if the values for the objective are different for certain time steps. Otherwise, WFM uses the single value that you configure and applies it across all open hours of the activity.

The screenshot shows the 'Build Staffing' dialog, Step 2 of 2. On the left, under 'Select build method', 'Service requirements' is selected. The main area is titled 'Update default SL objectives'. It contains three checked checkboxes with corresponding input fields: 'Use service level objective answered in sec' (60), 'Use average speed of answer objective' (ASA in sec, 40), and 'Use estimated average time to abandon in sec' (30). There are also radio buttons for 'Immediate work' (20%) and 'Use template' (Select...), and an unchecked checkbox for 'Use abandoned interaction objective'. At the bottom are buttons for 'Cancel', 'Help', '< Back', and 'Build'.

1. In Step 2 of the **Build Staffing** dialog, select the check box(es) for one or more of the following:
 - **Use service level objective answered in sec**—Specify the percentage of calls to be answered in a specific number of seconds. For example, 80% of calls must be answered in 20 seconds.
 - **Immediate work**—Enter a value (%) or
 - **Use template**—Click **Edit** to select a template from a list.
 - **Use average speed of answer objective**—Specify the average amount of time it takes for an agent to answer a call.
 - **ASA in "sec"**—Enter a value (seconds) or

-
- **Use template**—Click **Edit** to select a template from a list.

1. Continued...

- **Use estimated average time to abandon in sec**—This is not a service objective. It's a parameter that helps define the queuing system used when WFM builds staffing requirements. This value represents the average time it takes for impatient callers to abandon the call.
 - **Use abandoned interaction objective**—Check this box to enable it and
 - **Maximum percent of interactions abandoned**—Enter a value (%).
- **Use occupancy objectives**—The total amount of time the agent is actually working on an activity as a percentage of the total amount of time the agent is available to work on an activity. See the example.
 - **The maximum occupancy rate (%)**.—Enter a value (%) or
 - **Use template**—Click **Edit** to select a template from a list.

2. If you want to update the default service level objective values with the new values you have specified, select the **Update activity default SL objective** option for each parameter you want to update. For more information, see Save default service level objectives.
3. When all requirements are defined, click **Build**.
WFM Web calculates staffing and displays the data in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Example—Occupancy objectives:

Assume an agent has a shift from 8am-5pm, with a 30-minute lunch and 2x15-min breaks. Although the agent's total shift duration is 9 hours, the total amount of time the agent is actually available for work is 8 hours, after subtracting the time for the lunch and breaks.

Defining staffing requirements

If you select **Staffing requirements** for the build method in the **Build Staffing** wizard, use the following settings to define how staffing requirements are built for Immediate activities, if you do not define any service objective, or for Fixed-staff activities.

Build Staffing

Step 2 of 2

Select build method

Staffing requirements

☒ Number of agents at each timestep

☐ Average activity handling time in sec

☐ Use staffing template

Select...

☐ Save in default objectives

Cancel

Help

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Build

1. In Step 2 of the **Build Staffing** dialog, select one of the following options:

- **Number of agents at each timestep**—Enter a value for the number of agents.
- **Average activity handling time in "sec"**—Enter a value (seconds).
- **Use staffing template**—Click **Edit** to select a template from a list.

Select the **Save in default objectives** check box if you want to update the default staffing requirement values with the new values you have specified.

2. When all requirements are defined, click **Build**.

WFM Web calculates staffing and displays the data in the Staffing view. An error message appears if WFM Web cannot complete the calculation.

Defining multimedia service level objectives

If you select **Multimedia service level objectives** for the build method in the **Build Staffing** wizard, use the following settings to define service level objectives when staffing Deferred activities, such as responding to emails. Use either one of the following procedures:

Build Staffing

Step 2 of 2

Specify multimedia service level objectives

Deferred work

☒ 20%
 ☐ Use service level template Select... Edit

☐ Save deferred work in default SL objectives

Time based on

☒ Hours 01:00:00
 ☒ Non-interrupted time
 ☐ Interrupted time

☐ Business days 0

☐ Save deferred time in default SL objectives

Cancel

Help

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Build

1. In Step 2 of the **Build Staffing** wizard:

- Enter a value (%) for **Deferred work** or
- Select **Use service level template** and click **Edit** to select a template from a list.

Select the **Save deferred work in default SL properties** check box if you want to save the values you have specified as the default service level objective values for this setting.

2. Enter **Time based on**:

- **Hours** and select either **Non-interrupted time** or **Interrupted time** or
- **Business days** and enter an integer greater than 0.

Select the **Save deferred time in default SL properties** check box if you want to save the values you have specified as the default service level objective values for this setting.

3. When all objectives are defined, click **Build**.

Understanding the build staffing settings

Use **Build Staffing** dialog to specify the settings described below.

Indirectly occupied time

Indirectly occupied time (IOT) is a parameter that helps to define the queuing model that WFM uses when building a staffing forecast. WFM considers a certain pool of agents in its queuing model when determining how calls will be distributed from the queue to agents. IOT affects the availability of agents to handle calls. For example, if you enter a value for IOT, such as 10%, an agent will not be in the agent pool 10% of the time (because the agent is off the phone).

Alternatively, you can define IOT by using a template.

Compare results against previous

If you selected the **Compare results against previous** check box in the Build Staffing wizard Step 1, WFM compares the results obtained from the wizard with the previous staffing scenario results.

If you selected a Deferred activity, the **Initial queue** field displays. Enter an integer value that is 0 or greater, or leave this value empty and the build process will assume that the value is 0.

After you have completed the steps in the wizard, the Staffing Build Results window opens, showing a comparison of the new and previous calculated staffing in a graph.

Where the new calculated staffing results in:

- An increased number of agents, the graph shows the area in dark blue.
- A decreased number of agents, the graph shows the area in rose.

Click **Save** to keep the new calculated staffing in your scenario or **Discard** to return to the original calculated staffing values.

What is the initial queue value?

The initial queue value is used in the Contact Center Performance Report > **Queue** > **Forecasted** column for the first day of the new forecasting period after you publish the Master Forecast. For example, if you have published the Master Forecast for 02/02 - 08/02, the Forecasted column for 09/02 displays the backlog value that is proposed in the Staffing Forecast Build wizard for 09/02 in the **Initial queue** field.

The **Initial queue** field is visible only for Deferred activity types.

Save default service level objectives

If you are building staffing for a single (or multi-site) **Immediate** activity type, you can choose to update some or all of the default service level objectives with the new values you have specified. You can choose which parameter values to save as the new defaults by selecting the **Update activity default SL objective** option in the **Build Staffing** dialog for each parameter you want to update. You can then apply the updates in one of two ways:

- **Remove all** is the default setting. For each parameter where the **Update activity default SL objective** option is selected, the default service level objective value for that parameter is updated to

the new specified value while the default values (or templates) for all other parameters are cleared.

- When **Append selected** is selected, the default service level objective value for each parameter where the **Update activity default SL objective** option is selected is updated to the new specified value. The default values for all other parameters remain unchanged.

If you do not select the **Update activity default SL objective** check box for any parameters, the default values remain unchanged.

Important

If you are using templates to specify the parameter values, you can select only one template to save when choosing to update the default service level objectives for the activity. WFM Web will prompt you to choose the template you want to save. The staffing will be built according to the values of all selected templates, but only the template selected to be saved will update the default service level objective value.