Workforce Management Administrator's Guide

Schedule Summary Report

4/12/2025

Schedule Summary Report

In this topic, find information about the Workforce Management Schedule Summary reporting metrics. To go directly to a specific metric, click any link in the tables below.

• AHT – Difference • AHT – Forecasted • AHT – Scheduled	• ASA – Difference • ASA – Forecasted • ASA – Scheduled	• Budget – Difference • Budget – Forecasted • Budget – Scheduled	• Coverage – Difference • Coverage – Published • Coverage – Scheduled	• Difference – Calculated • Difference – Required
• Interaction Volume – Difference • Interaction Volume – Forecasted • Interaction Volume – Scheduled	• Number of Agents	• Occupancy – Difference • Occupancy – Forecasted • Occupancy – Scheduled	• Service Level – Difference • Service Level – Forecasted • Service Level – Scheduled	• Staffing – Calculated • Staffing – Required

> ## Tip
>
> A period in these metrics refers to the specific granularity of the report being run. For *Intra-day* granularity a period is 15 minutes; for *Daily* granularity a period is 1 day; and so on.

See Other Metrics Topics

- Contact Center Performance Report Metrics

- Agent Adherence Report Metrics

- Endnotes (for Metrics)

Number of Agents

Number of Agents is also called *Headcount* or *Agents in Seats*. If an agent is multi-skilled and is scheduled for more than one activity for a given period, he will actually count as 1 headcount for *each* of the activities for which he is scheduled. Therefore, in comparison with Coverage, Headcount can *double count* an agent if he is multi-skilled and is scheduled for more than one activity during a particular period.

For example, if an agent is scheduled for two activities in a particular 15-minute timestep, he might count as 0.5 towards the Coverage of each of those activities, but he would count as 1 Headcount towards each of those activities. Unlike Coverage, where an agent could count towards partial coverage if he's scheduled for something other than activity work for part of a 15-minute timestep, for Headcount it is *all or nothing*. This means that as long as an agent is scheduled for at least 1 minute of work on an activity during a given 15-minute timestep, he will count as 1 Headcount towards that activity.

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How the Total / Average is Calculated

The value for Headcount in the totals/averages row at the top of this view (or bottom of the report) is a simple average of all the values for all the timesteps of the selected time period (which can be: Intra-day, Daily, nWeeks, or Monthly).

Service Level – Scheduled

The Service Level that you should achieve on this activity, with the number of agents currently scheduled for this activity. Due to agent rounding, this value may differ from the original service level objective that was stated when the staffing forecast was built.

For example, WFM might forecast a staffing requirement of 12 agents to meet a service level objective of 80% of interactions answered within 20 seconds. But a Service Level Percentage Forecast may report a higher number, such as 83.48%. This is because 12 was the minimum number of agents required to meet the 80% service level objective but, with that number of agents, the contact center can be expected to achieve a slightly better service level than 80%. With one less agent (11 agents), the contact center would not be expected to achieve the 80% service level.

How the Total / Average is Calculated

A weighted average, calculated across the open hours:

AVG SL Scheduled = S (*Scheduled SL$_i$ * Forecasted IV$_i$*) / S (*Forecasted IV$_i$*)

Where:

 Scheduled SL$_i$= Calculated Service Level based on the number of scheduled agents for *timestep$_i$*
Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
    timestep$_i$= timestep number over the open hours

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Service Level—Forecasted

The Service Level Percentage objective that you should be able to achieve when staffing with the number of agents from the staffing forecast (also known as Budget – Difference).

How the Total / Average is Calculated

A weighted average, weighted by Forecasted IV:

AVG SL Forecasted = Σ (*Forecasted SL$_i$* * *Forecasted IV$_i$*) / Σ (*Forecasted IV$_i$*)

Where:

Forecasted SL$_i$= Forecasted Service Level for *timestep$_i$*
Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
    timestep$_i$= timestep number over the open hours

Service Level – Difference

Service Level – Scheduled minus Service Level – Forecasted.

Interaction Volume – Scheduled

The number of interactions that can be handled based on the schedule coverage. Calculated by using the inverse of the WFM's staffing forecast algorithm.

WFM uses a *modified Erlang* algorithm to derive Calculated Staffing based on the IV, the AHT, and service objectives stated when building the forecast. Therefore, to calculate the scheduled interaction volume, WFM uses that formula *in reverse*.

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How the Total / Average is Calculated

The sum is across the entire report time range.

Interaction Volume – Forecasted

The interaction volume taken from the Master Forecast.

How the Total / Average is Calculated

The sum across the entire report time range.

Interaction Volume – Difference

Interaction Volume – Scheduled minus Interaction Volume – Forecasted.

AHT – Scheduled

The Average Handling Time (AHT) per interaction that you should achieve, based on the schedule coverage. Calculated by using the *inverse* of the WFM's staffing forecast algorithm.

WFM uses a *modified Erlang* algorithm to derive Calculated Staffing, based on the IV, AHT, and service objectives stated when building the forecast. Therefore, to calculated the scheduled AHT, it uses that formula *in reverse*.

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How the Total / Average is Calculated

A weighted average, weighted by Forecasted IV:

AVG AHT Scheduled = Σ (*Scheduled AHT$_i$* * *Forecasted IV$_i$*)/ Σ (*Forecasted IV$_i$*)

Where:

Scheduled AHT$_i$= Scheduled Average Handling Time for *timestep$_i$*
Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
　　timestep$_i$= timestep number over the open hours

AHT – Forecasted

Average Handling Time of interactions, taken from the Master Forecast.

How the Total / Average is Calculated

A weighted average, weighted by Forecasted IV:

AVG AHT Forecasted = Σ (*Forecasted AHT$_i$* * *Forecasted IV$_i$*)/ Σ (*Forecasted IV$_i$*)

Where:

Forecasted AHT$_i$= Forecasted Average Handling Time for *timestep$_i$*
　Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
　　timestep$_i$= timestep number over the open hours

AHT – Difference

AHT – Scheduled minus AHT – Forecasted.

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Budget – Scheduled

The budget for this schedule based on the number of agents from the Coverage – Scheduled column. The calculation is based on a full-time equivalent's hourly wage, as well as on the Planned Overhead % and Unplanned Overhead % (which were specified when the staffing forecast was built).

For a 15-minute timestep, the formula is:

`(Coverage/4)*((100/(100-Planned Overhead))*(100/100-Unplanned Overhead)* Hourly Wage)`

The unit of measure is in whatever monetary unit was used when the `Hourly Wage` was specified while building the forecast.

How the Total / Average is Calculated

This figure is in the sum across the entire report time range.

Budget – Forecasted

The budget for the schedule based on the number of agents from the "Staffing – Calculated" column, based on a full-time equivalent's hourly wage, as well as the Planned Overhead % and Unplanned Overhead % (specified when the staffing forecast was built).

For a 15-minute timestep, the formula is:

`(Staffing/4)*((100/(100-Planned Overhead))*(100/100-Unplanned Overhead)* Hourly Wage)`

The unit of measure is in whatever monetary unit was used when the `Hourly Wage` was specified when building the forecast.

How the Total / Average is Calculated

This figure is in the sum across the entire report time range.

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Budget – Difference

Budget – Scheduled minus Budget – Forecasted.

Staffing – Calculated

A value taken directly from the staffing forecast, for the particular timestep.

How the Total / Average is Calculated

The value in the column footer is calculated based on the same approach as what is described for Coverage – Scheduled.

Staffing – Required

A value taken directly from the staffing forecast, for the particular timestep. It will be populated only if you put some values in the optional `Required Staffing` column in your staffing forecast.

How the Total / Average is Calculated

The value in the column footer is calculated based on the same approach as what is described for Coverage – Scheduled.

Difference – Calculated

Coverage – Scheduled minus Staffing – Calculated.

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How the Total / Average is Calculated

The value in the column footer is calculated based on the same approach as what is described for Coverage – Scheduled.

Difference – Required

Coverage – Scheduled minus Staffing – Required.

Coverage – Scheduled

The actual amount of time that an agent should count towards coverage of the work in this time period. If an agent is multi-skilled and is scheduled for multiple activities during a given period, he may count fractionally towards the coverage of each activity (for example, as 0.5 toward each of two activities for which he's scheduled).

If an agent has something other than activity work scheduled for part of a period, that will be subtracted from the amount of time he's counted towards the coverage of that activity work. For example, an agent who is scheduled for an activity for a given 15-minute timestep but has a break for the first 5 minutes of that timestep, would count as 0.67 towards the coverage of that activity for that period.

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How the Total / Average is Calculated

This figure is in FTEs. For the calculation, see Endnote 1.

The value in the totals/averages row at the top of this view (or bottom of the report) is calculated as follows:

1. WFM calculates the sum of the agents which are covering this activity within each timestep during the day.

2. The value calculated in step 1 is multiplied by 15 minutes in order to get the total time of activity work.

3. The value calculated in step 2 is divided by the value set for `Paid Hours a Day`, which was entered while building staffing forecast for this activity.

Coverage – Published

The original values from the Coverage – Scheduled column the last time a schedule scenario was published to the Master Schedule.

How the Total / Average is Calculated

The value in the column footer is calculated based on the same approach as what is described for Coverage – Scheduled.

Coverage – Difference

Coverage – Scheduled minus Coverage – Published.

ASA – Scheduled

The Average Speed of Answer that you should achieve on this activity, with the number of agents currently scheduled for this activity.

The totals/average row for ASA Scheduled reports a weighted average, calculated across the open hours and weighted by Forecasted IV (exactly as for Service Level – Scheduled):

A weighted average, weighted by Forecasted IV:

AVG ASA Scheduled = S (*Scheduled ASA$_i$* * *Forecasted IV$_i$*) / S (*Forecasted IV$_i$*)

Where:

Scheduled ASA$_i$= Calculated Average Speed of Answer based on the number of scheduled agents for *timestep$_i$*
Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
     timestep$_i$= timestep number over the open hours

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ASA – Forecasted

The totals/average row for ASA Forecasted reports a weighted average, calculated across the open hours and weighted by Forecasted IV (exactly like for Service Level – Forecasted):

A weighted average, weighted by Forecasted IV:

AVG ASA Forecasted = S (*Forecasted ASA$_i$* * *Forecasted IV$_i$*) / S (*Forecasted IV$_i$*)

Where:

Forecasted ASA$_i$= Calculated Average Speed of Answer based on the number of scheduled agents for *timestep$_i$*
 Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
     timestep$_i$= timestep number over the open hours

ASA – Difference

ASA – Scheduled minus ASA – Forecasted.

Occupancy – Scheduled

The Occupancy that you *should achieve* on this activity, with the number of agents currently scheduled.

How the Total / Average is Calculated

The totals/average row for Occupancy reports a weighted average, calculated across the open hours and weighted by Forecasted IV (exactly as for Service Level – Scheduled:

A weighted average, calculated across the open hours and weighted by Forecasted IV:

AVG Occupancy Scheduled = S (*Scheduled Occ$_i$ * Forecasted IV$_i$*) / S (*Forecasted IV$_i$*)

Where:

Scheduled Occ$_i$= Calculated Occupancy based on the number of scheduled agents for *timestep$_i$*
Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
      timestep$_i$= timestep number over the open hours

Occupancy – Forecasted

The Occupancy objective that you *should be able to achieve* when staffing with the number of agents from the staffing forecast (Staffing – Calculated).

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How the Total / Average is Calculated

The totals/average row for Occupancy reports a weighted average, calculated across the open hours and weighted by Forecasted IV (exactly as for Service Level – Forecasted):

A weighted average, weighted by Forecasted IV:

AVG Occupancy Forecasted = S (*Forecasted Occ$_i$ * Forecasted IV$_i$*) / S (*Forecasted IV$_i$*)

Where:

Forecasted Occ$_i$= Forecasted Occupancy for *timestep$_i$*
 Forecasted IV$_i$= Forecasted Interaction Volume for *timestep$_i$*
      timestep$_i$= timestep number over the open hours

Occupancy – Difference

Occupancy – Scheduled minus Occupancy – Forecasted.

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