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Workforce Management Supervisor Help

Master Forecasts

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Master Forecasts

Tip

This page describes Master Forecasts in the new Workforce Management (WFM) Forecast module interface (introduced in 8.5.2). If you are using the classic Supervisors interface and have landed on this page by accident, see the [Workforce Management Web for Supervisors Help \(Classic\)](#), which describes the **classic Forecast module**, including the Master Forecast.

WFM Master Forecast consists of the volumes and staffing data that is built on **forecast scenarios** that have been published. Here's what you'll find in these views:

- **Master Forecast Volumes**—Interaction volumes (IV) and average handle time (AHT) data.
- **Master Forecast Staffing**—Calculated and required staffing data.
- **Master Forecast Shrinkage**—Overhead data, which WFM uses to forecast shrinkage while scheduling.

Note that the **Forecast > Scenarios** view also has **Volumes**, **Staffing** and **Shrinkage** views. These views are similar, but in some ways different from the Master Forecast views. For example, you might create several forecast scenarios containing volumes, staffing, and shrinkage data before choosing one that is optimal for publishing to the Master Forecast.

Viewing the volumes data

Use the **Forecast Volumes** view in the Master Forecast to display the interaction volumes (IV) and average handle time (AHT) data. When you select an object in this view, the start date is determined by the selected business unit's week start day setting, regardless of your locale settings.

This view provides standard **date-selectors** and a grid that shows statistics for days or timesteps.

Link to video

To open the **Volumes** view in the Master Forecast:

1. In the navigation bar, select **Forecast > Volumes**.
2. In the **Objects** tree, expand a business unit to select a site, activity, or multi-site activity.

The view displays a graph above a table, each containing the same statistics and controls that set the data display properties.

If you do not see any volumes data, you can adjust the **Period** drop-down list, the sliders (below the graph), or the **Granularity** and **date-selectors** at the top of the window to reflect those used for the forecast.

The grid displays open hours for selected site activities and multi-site activities in the same way.

You can view the staffing or shrinkage data in the Master Forecast, by selecting **Staffing** or **Shrinkage** from the drop-down list in the top-left corner of this view.

Setting the data display properties

The image consists of three overlapping screenshots of the 'Forecast' application interface, illustrating how to customize data display properties. The interface includes a 'Master Forecast' header, a 'Volumes' dropdown, an 'Activities' list on the left, and a main data display area.

- Top Screenshot:** Shows the 'Primary statistic' dropdown menu open, with 'Interaction volumes' selected. A handwritten note 'Choose primary statistic.' points to this menu.
- Middle Screenshot:** Shows the 'Granularity' dropdown menu open, with '15' selected. A handwritten note 'Choose granularity.' points to this menu.
- Bottom Screenshot:** Shows the 'Period' dropdown menu open, with 'Month' selected. A handwritten note 'Choose period' points to this menu.

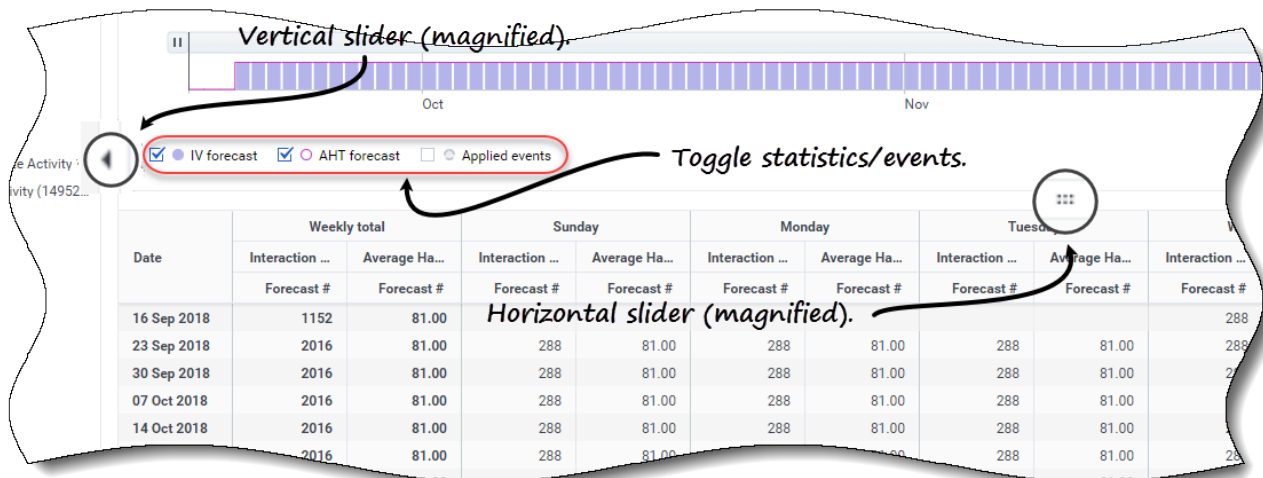
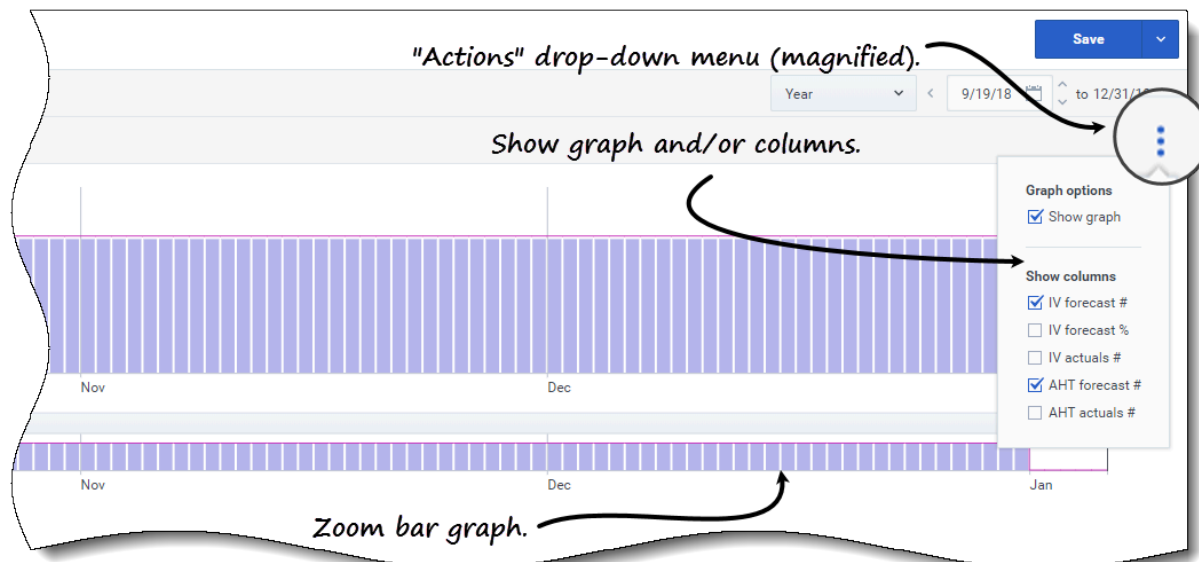
The interface also includes a date range selector showing '6/24/18 to 6/30/18' and a vertical axis label 'AHT seconds'.

In this view, use the following controls to customize the data display:

- **Primary statistic drop-down list**—Select the statistic that will be displayed as primary, by selecting

Interaction Volume (IV) or **AHT** (average handle time). The primary statistic displays as a bar in the graph and the secondary statistic displays as a red line.

- **Granularity drop-down list**—Select **Month** or **Year** to adjust the granularity to **Day**. Select **Week** to further adjust each row's time range by selecting **15**, **30**, or **60** (minutes) from this list.
- **Period drop-down list**—Change the time range for the graph and grid by selecting **Year**, **Month**, or **Week**. If the selected site has a configured planning period, you can also select **Planning Period**.
- **Date range**—Use the **date-selectors** (top-right portion of the view) to switch to a different period within the scenario forecast's date range. The week number is also displayed here when the selected period is **Week**.



- **Actions drop-down menu**—Click this icon to change the graph and/or table:
 - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check

box. See also [Sliders](#).

- **Show columns**—Show/hide data columns in the table by selecting/clearing the following check boxes:
 - **IV forecast #**
 - **IV forecast %**
 - **IV actuals #**
 - **AHT forecast #**
 - **AHT actuals #**

Click anywhere in the view to close the drop-down menu.

- **Toggle statistics/events check boxes**—Below the graph, toggle a statistic or applied events on or off. Selecting the check box or clicking the radio button toggles it on, displaying the primary statistic as bars, the secondary statistic as a red line, and applied events as a striped orange line. Clearing the check box or clicking the radio button toggles it off, making the statistic or event invisible in the graph. When turned on, the primary statistic's radio button is light blue and the **Applied events** button is yellow.

Tip

Applied events are events that have been added to Overlays and the striped orange line represents the start of the event's impact for that period.

Link to video

Watch the video demonstrating how following features (described here and shown in the graphics above) work. The Smooth graph feature described in the first half of the video is not available in the Master Forecast views:

- **Sliders**—Drag the vertical slider left/right to show/hide the graph, zoom bar, grid and/or **Objects** pane. Click the arrows in the vertical slider to resize the **Objects** pane. Drag the horizontal slider up and down to show/hide the graph or grid.
- **Zoom bar graph**—Use the zoom bar handles to narrow/widen the focus in the graph, by sliding the handle left/right. You can zoom to a minimum of one day. After narrowing the focus, place your cursor over the graph and change the range of the zoom by dragging and dropping it to the left or right. For example, if you narrow the focus to Sunday, Monday, and Tuesday, but want to change it, drag and drop the zoom to the right to Tuesday, Wednesday, Thursday.

Reading the volumes data

The graph shows the statistics, dates, period, and granularity that you selected above. The vertical axis indicates the primary statistic on the left and the secondary statistic on the right. The horizontal axis indicates the different units for the two statistics.

To understand the volumes data, see [Reading the data](#) in the **Scenario > Volumes** topic.

Editing the volumes data

In the **Master Forecast > Volumes** grid, WFM enables you to edit values in the Actual columns only (**Actual IV** and **Actual AHT**). You can edit timesteps and daily totals when the selected period is **Week** and edit weekly and daily totals when the selected period is **Month** or **Year**.

You must have the Forecast access privilege **Edit Historical Data** to edit values in the Actual columns.

When changing the period, granularity, and/or values in the grid, note that daily totals are aggregated values for a 24-hour period. This means the daily and weekly totals automatically adjust and are redistributed according to the original distribution of volume for each day of the week or week of the month/year.

Find information about editing modes and see the editing procedure in [Editing data in the grid](#) in the **Scenarios > Volumes** topic.

Copying and pasting the volumes data

In the **Master Forecast > Volumes** grid, WFM enables you to copy and paste values to/from the actual columns only (**Actual IV** and **Actual AHT**). When selecting data for pasting, if you select cells in non editable columns, such as **IV Forecasted #**, only the cells in **Actuals #** columns are pasted.

You must have the Forecast access privilege **Edit Historical Data** to copy/paste data in this view.

For more information about copying and pasting volumes data, see [Selecting data to copy and paste](#).

Viewing the staffing data

Use the **Forecast Staffing** view in the Master Forecast to display the required and calculated staffing data. This view provides standard [date-selectors](#) and a grid that shows statistics for days or timesteps.

[Link to video](#)

To open the **Staffing** view in the Master Forecast:

1. In the navigation bar, select **Forecast > Staffing**.
2. In the **Objects** tree, expand a business unit to select a site, activity, or multi-site activity.

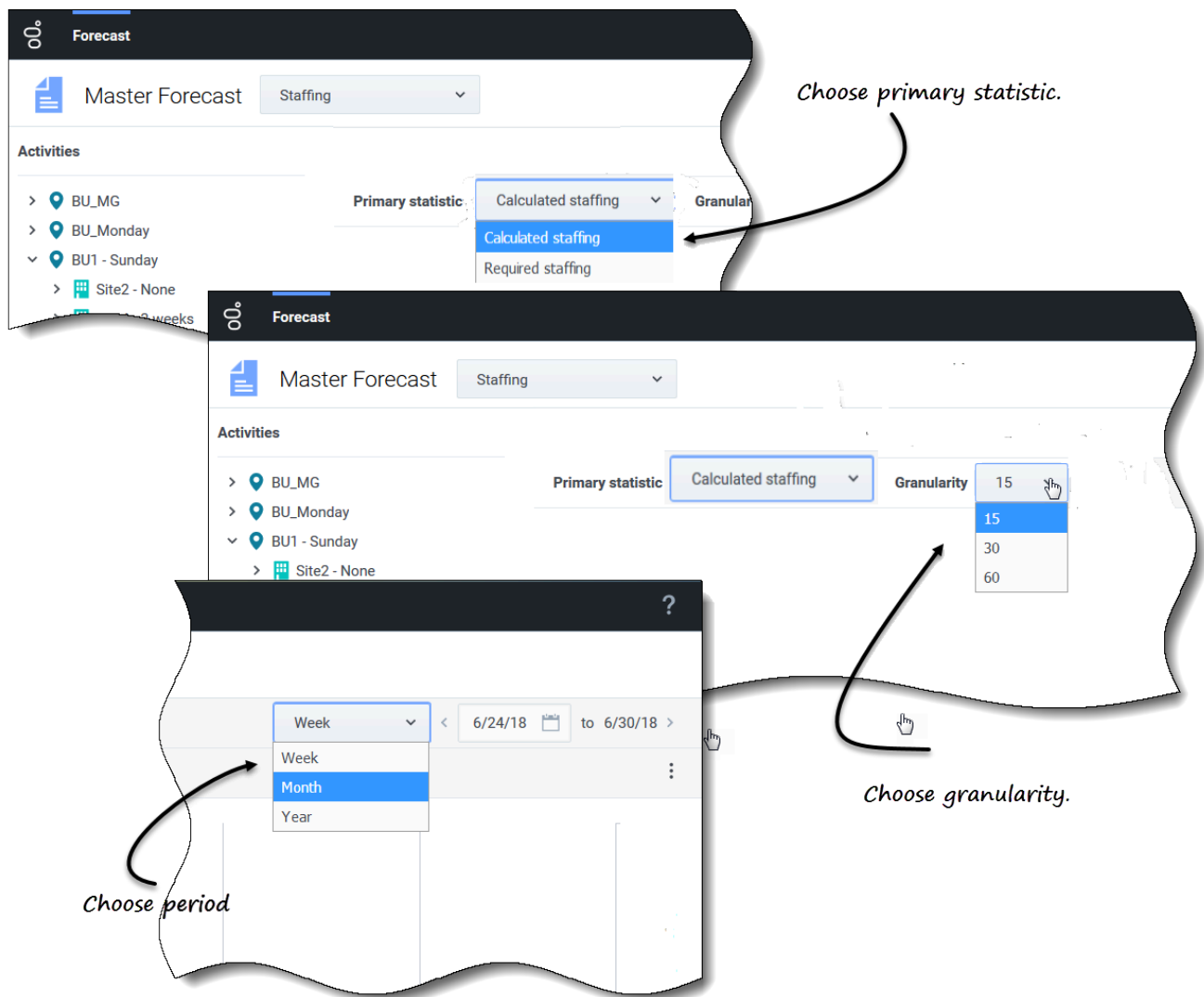
The view displays a graph above a table, each containing the same statistics and controls that set the data display properties.

If you do not see any staffing data, you can adjust the [Period](#) drop-down list, the sliders (below the graph), or the [Granularity](#) and [date-selectors](#) at the top of the window to reflect those used for the forecast.

The grid displays open hours for selected site activities and multi-site activities in the same way.

You can view the volumes or shrinkage data in the Master Forecast, by selecting **Volumes** or **Shrinkage** from the drop-down list in the top-left corner of this view.

Setting the data display properties

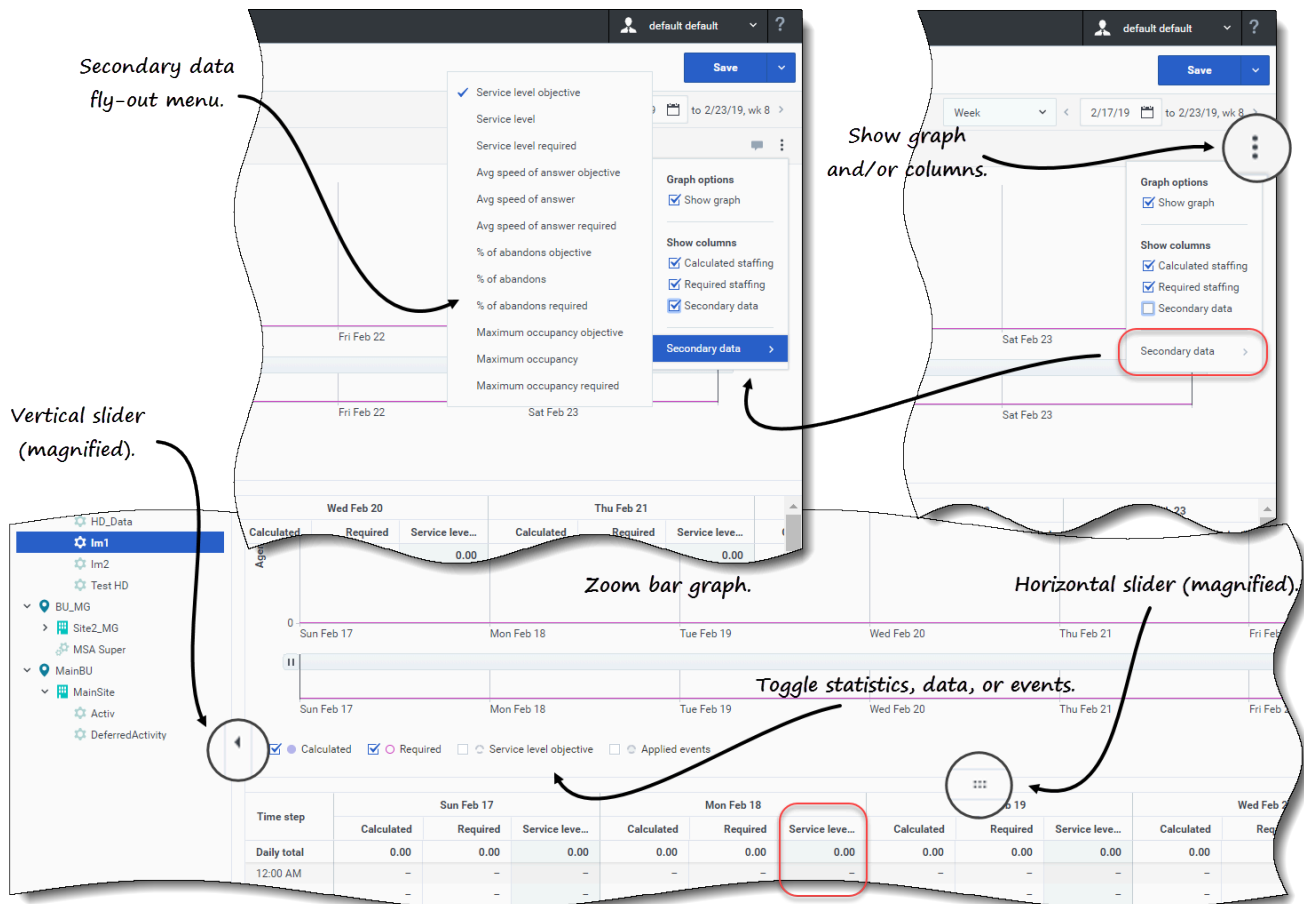


In this view, use the following controls to customize the data display:

- **Primary statistic** drop-down list—Select the statistic that will be displayed as primary, by selecting **Calculated staffing** or **Required staffing**. The primary statistic displays as a bar in the graph and the secondary statistic displays as a red line.
- **Granularity** drop-down list—Select **Month** or **Year** to adjust the granularity to **Day**. Select **Week** to

adjust the granularity to **15**, **30**, or **60** (minutes).

- **Period drop-down list**—Change the period or time range for the graph and grid by selecting **Year**, **Month**, or **Week**. If the selected site has a configured planning period, you can also select **Planning Period**.
- **Date range**—Use the **date-selectors** (top-right portion of the view) to switch to a different period within the scenario forecast's date range.



- **Actions drop-down menu**—Click this icon to change the graph and/or table:

- **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also [Sliders](#).
- **Show columns**—Show/hide data columns in the grid by selecting/clearing the **Calculated staffing**, **Required staffing** or **Secondary data** check boxes.
- **Secondary data**—Click this item to open a fly-out menu that list all of the secondary data types that can be displayed in the graph and grid.
If Secondary data is checked in the Show columns section, the data type that you select from the fly-out menu is the name of the column that displays in the grid and the radio button/check box below the graph, and it displays as the y-axis statistic. To learn more, see [Viewing the staffing secondary data](#).

Click anywhere in the view to close the drop-down menu.

- **Toggles check boxes**—Below the graphic, toggle a statistic (**Calculated**, **Required**, **Secondary data**), or Applied events on or off in the graph. Selecting the check box or clicking the radio button toggles it on, and clearing the check box or clicking the radio button toggles it off. When checked, the radio button is:
 - solid blue for **Calculated**.
 - outlined in magenta for **Required**.
 - outlined in a broken purple line for **Secondary data**.
 - outlined in a broken yellow line for **Applied events**.

Watch the [video](#) demonstrating how the [Sliders](#) and [Zoom bar graph](#) (shown in the graphics above) work. The Smooth graph feature described in the first half of the video is not available in the **Master Forecast** views.

Reading the staffing data

The graph shows the staffing, dates, period, and granularity that you selected above. The vertical axis indicates the number of agents staffed. The horizontal axis displays different units for the staffing data.

To understand the staffing data, see [Reading the data](#) in the **Scenario > Staffing** topic.

Viewing the staffing secondary data

In the **Master Forecast > Staffing** view, you can view secondary data in the graph and grid, in any granularity (Day, 15, 30, 60 minutes) and for any period (Week, Month, Year). Note that secondary data column in the grid is read only, and fixed-staff activities and multi-site activities do not have secondary data.

Displaying and viewing secondary data in the **Master Forecast > Staffing** view is the same as described in the [Scenarios Staffing](#) topic.

Editing the staffing data

In the Master Forecast views, if you select the period **Year** or **Month**, you can click inside the **Weekly Totals** cells in the grid and edit the value there. Find information about editing modes and see the editing procedure in [Editing data in the grid](#) in the **Scenarios > Staffing** topic.

Copying and pasting the staffing data

In the **Master Forecast > Staffing** grid, WFM enables you to copy values from the **Calculated** and **Required** columns and paste them to external documents, such as Excel or Notepad. You cannot paste data in this view.

For more information about copying and pasting staffing data, see [Selecting data to copy and paste](#).

Viewing the shrinkage data

Use the **Forecast Shrinkage** view in the Master Forecast to display the overhead data, which WFM uses to forecast shrinkage while scheduling. This view provides standard [date-selectors](#) and a grid that shows statistics for days or time steps.

Link to video

To open the **Shrinkage** view in the Master Forecast:

1. In the navigation bar, select **Forecast > Shrinkage**.
2. In the **Objects** tree, expand a business unit to select a site, activity, or multi-site activity.

The view displays a graph above a table, each containing the same shrinkage data and controls that set the data display properties.

If you do not see any shrinkage data, you can adjust the [Period](#) drop-down list, the sliders (below the graph), or the [Granularity](#) and [date-selectors](#) at the top of the window to reflect those used for the forecast.

The grid displays open hours for the selected site activities and multi-site activities in the same way.

You can view the volumes or staffing data in the Master Forecast, by selecting [Volumes](#) or [Staffing](#) from the drop-down list in the top-left corner of this view.

Setting the data display properties

Choose shrinkage type.

Choose period.

Choose granularity

Choose graph options.

Zoom bar graph and handle.

Vertical slider (magnified).

Horizontal slider (magnified).

In this view, use the following controls to customize the data display:

- **Shrinkage type drop-down list**—Select the shrinkage type to be displayed by selecting **Grand total**, **Total planned**, or **Total unplanned**.
- **Period drop-down list**—Change the period or time range for the graph and grid by selecting **Year**, **Month**, or **Week**. If the selected site has a configured planning period, you can also select **Planning Period**.
- **Granularity drop-down list**—Adjust the granularity to **Day** if you selected **Month** or **Year** in the **Period** drop-down list. Adjust the granularity to **15**, **30**, or **60** (minutes) if you selected **Week** in the **Period** drop-down list.
- **Date range**—Use the **date-selectors** (top-right portion of the view) to switch to a different period within

the scenario forecast's date range.

-  **Actions** *drop-down menu*—Click this icon to change the graph and/or table:
 - **Graph options**—Show/hide the graph and zoom bar by selecting/clearing the **Show graph** check box. See also [Sliders](#).

Watch the [video](#) demonstrating how the [Sliders](#) and [Zoom bar graph](#) (shown in the graphics above) work. The Smooth graph feature described in the first half of the video is not available in the **Master Forecast** views:

Reading the shrinkage data

The graph shows the shrinkage type, date, period, and granularity that you selected above. The vertical axis indicates the shrinkage percentage. The horizontal axis displays different units for the shrinkage.

To understand the shrinkage data, see [Reading the data](#) in the **Scenarios > Shrinkage** topic.

Editing the shrinkage data

In the Master Forecast views, if you select the period **Year** or **Month**, you can click inside the **Weekly Totals** cells in the grid and edit the value there. Find information about editing modes and see the editing procedure in [Editing data in the grid](#) in the **Scenarios > Shrinkage** topic.

Copying and pasting the shrinkage data

In the **Master Forecast > Shrinkage** grid, WFM enables you to copy values from the columns in the grid and paste them to external documents, such as Excel or Notepad. You cannot paste data in this view.

For more information about copying and pasting shrinkage data, see [Selecting data to copy and paste](#).

Finding events in forecasts

Find events for an activity or multi-site activity quickly by using the **Find Events** search dialog, available only in the **Master Forecast > Volumes** view.

When a **Find Events** search is initiated, WFM searches through historical data for any period of time that represents an anomaly. For example: imagine that the AHT on May 24, 2008, between 8 p.m. and 9 p.m. was 500% higher than on the historical norm for those hours. The **Find events** search dialog can quickly locate this anomaly in the historical data for you, when it might otherwise be hard to find.

The **Find events** dialog opens with **Possible events** selected by default and contains the default values for the statistic, granularity, and start and end dates based on the Master Forecast Volumes primary statistic, granularity, and date range. You can change any of these default settings.

Understanding event types

This Help mentions three types of events, as follows:

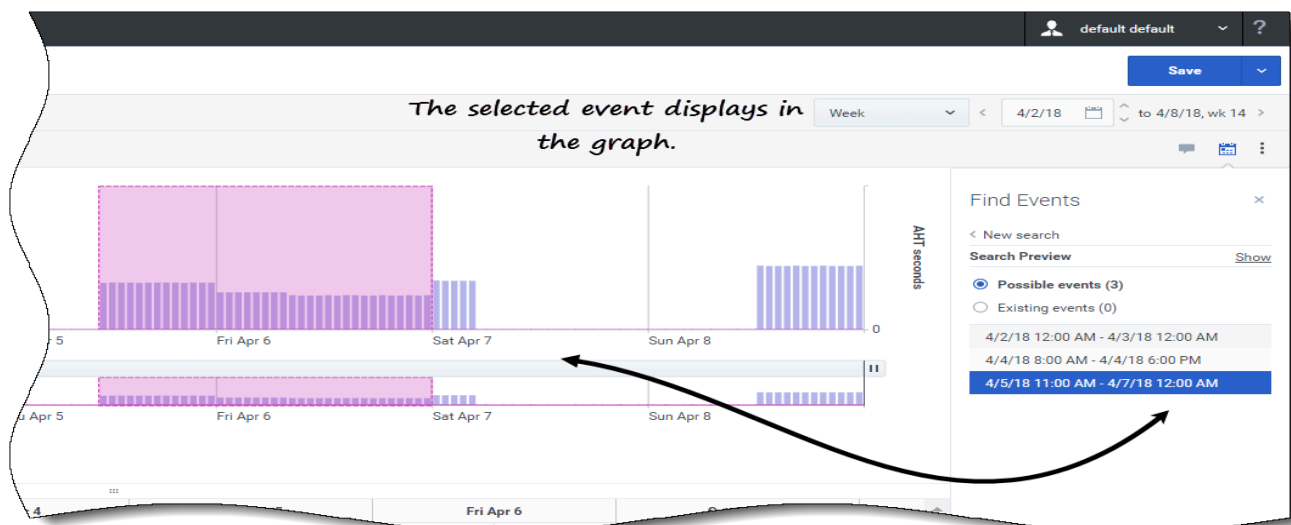
- Applied events—You apply these when you are building volumes. These events are equal to or a subset of **Existing events**.
- Existing events—You define or add these in the **Overlays** view.
- Possible events—WFM calculates these using the Find events feature (described in this topic), based on historical data.

When selected in the results pane, **Possible events** appear in a yellow bar graph and **Existing events** appear in a striped pink bar graph.

Events can sometimes overlap. When this happens, hover your cursor over the overlapping area or non-overlapping area to display the event name and date.

The image shows three instances of the 'Find Events' dialog box, each with different annotations:

- Top Left:** Shows 'Existing events (3)' selected. Annotations include 'Results for Existing events.' pointing to the event list and 'Show/hide search criteria.' pointing to the 'Search Preview' section.
- Top Right:** Shows 'Existing events (0)' selected. Annotations include 'Start a new search.' pointing to the '< New search' button and 'No events within the time range.' pointing to the message 'You do not have any overlay events'.
- Bottom:** Shows 'Possible events (3)' selected. Annotations include 'Results for Possible events.' pointing to the event list and 'Create overlay or event.' pointing to the 'New overlay' and 'New event' buttons at the bottom.



To find events in a forecast:

1. Open the Master Forecast.
2. In the **Volumes** view, expand business units and sites in the Objects pane and select an activity or multi-site activity.
3. Below the date range, in the toolbar, click **Find events** .
The Find events dialog opens.
4. Retain the defaults, or select the **Data** type (**IV, AHT**) and **Granularity** (**Daily, Hourly**) on which to search.
5. Retain the defaults, or select a **Start date** and **End date**.
6. Enter the **Threshold** percentage (between 1 and 1000).
This is the percentage of deviation from historical data, that would identify the event you want to locate.
7. Click **Find events**.
When WFM completes the search, the dialog displays the results in two categories with the number of events found in brackets:
 - **Possible events (<n>)**
 - **Existing events (<n>)**

Click either radio button to see the result for that category.

Items in both results lists display in the format *<start date and time - end date and time>*. **Existing events** items also show the event name above the date/time range.

Selecting an event in the either list changes the primary statistic, granularity and date range in the toolbar, if applicable. If there are no events to display, you'll see the message *You do not have any overlay events*.

In the results dialog, you can also:

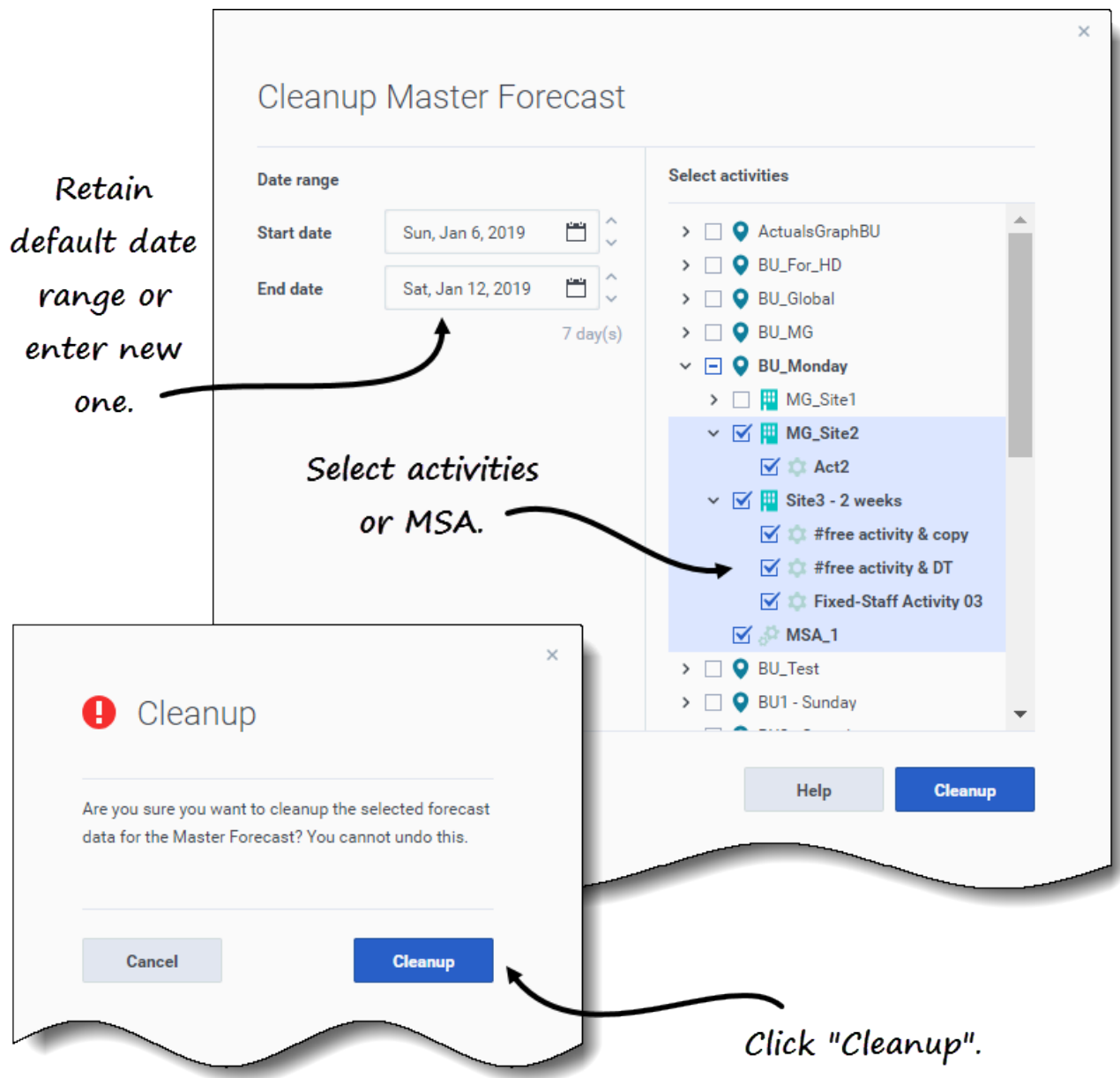
- Start a new search, by clicking the arrow (<) beside **New search**.
- Show/hide the search criteria in the results dialog by clicking **Show** or **Hide**.
- **Create an overlay**, by clicking **New overlay** (enabled only if **Possible events** is selected).
This action opens the New Overlay wizard.
- Create an event, by clicking **New event** (enabled only if **Possible events** is selected).
This action opens the New Event wizard. It contains a list of overlays and default values that are based on the search criteria. New events appear in the existing events list if it falls within the date range. If you enter an event name that already exists, WFM displays an error message in the New Event dialog.
- Close the dialog, by clicking the **X** in the upper-right corner.
- Cancel the search, by clicking **Cancel** or **X** in the upper-right corner of the progress dialog. WFM preserves your selections in the **Find events** dialog.

Cleaning up data in the forecast

From time to time, you might need to remove information from the Master Forecast for specific dates, activities, or multi-site activities (MSA). WFM simplifies this task by providing the **Cleanup** feature in all three Master Forecast views. You can clean up data for one or more business units, sites, activities, or MSA.

Warning

Be careful when using this feature. It deletes all of the saved data for the selected date range and activities or MSA. Genesys recommends that you do not use the **Cleanup** feature unless it is absolutely necessary. If you must remove Master Forecast data, Genesys recommends that you first extract the data to a forecast scenario (using the [Publish or Extract wizard](#)), and/or make a backup of the WFM database.



To remove data from Master Forecast for a specified date range:

1. Open a view in the Master Forecast (Volumes, Staffing, or Shrinkage).
2. Click **Cleanup**.
The Cleanup Master Forecast dialog opens.
3. In the **Start date** and **End date** fields, enter (or select from the calendar) the range of dates for which you want to remove data.
4. Expand the tree to select the business units, sites, activities, or MSA for which you want to remove data.

5. Click **Cleanup**.
6. In the **Cleanup** dialog, if you are sure you want to complete this action, click **Cleanup**.
7. When the dialog indicates that the process is complete, click **OK**.

Click **Cancel** or **X** in the upper-right corner at any point to close the dialog without changing the Master Forecast.

Important

If you click **Cancel** or **X** when the cleanup is in progress, WFM might or might not preserve the data, depending on how much of the process is complete.

Using the toolbar

You can use the following buttons on the toolbar in all Master Forecast views:

Icon	Name	Description
	Copy	Copies data selected in the grid to the clipboard.
	Cleanup	Opens the Cleanup Master Forecast dialog, enabling you to remove data from the Master Forecast for selected dates, activities, or multi-site activities.