GENESYS™

Workforce Management Web for Supervisors Help

Importing Data

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Importing Data

Use the **Import** view in the **Forecast** module to import **Historical Interaction Volume** or **Historical AHT**, **Forecast Interaction Volume**, **Forecast AHT**, and **Forecast Staffing** data.

Importing Data from a .CSV File

To import data:

1. In the **Forecast** module, click **Import**.

2. Expand the appropriate **Site** or **Business Unit** and choose the **Activity** for which you want to import data.

3. In the **Import Forecast Data** pane, click **Select File**.

4. Click **Import from file** to select a .CSV file that contains the data you want imported.

> **Tip**
>
> When data for deferred activities is imported or exported using the 24-hours period, the data is imported for each day using open hours like this:
>
> - The day start is the previous overnight day end or 00:00, whichever is later.
>
> - The day end is the overnight time end or 24:00 whichever is later.

5. From the **Granularity** drop-down list, select **15**, **30**, **60**, or **Daily**.

> **Tip**
>
> WFM does not import data for the last timestep in the selected period if you select the 15-, 30-, or 60-minute timestep. For example, assume your .CSV file contains data for the dates 4/15/2005 through 6/28/2005 in 15-minute timesteps. To completely import the data from every timestep, you must set the **End Date** to 6/29/2005 and the **End Time** to 12:00 AM.
>
> When WFM imports Historical data with 24-hours granularity, it takes into account only activity or multi-site activity open hours, because the import file contains data for days only (one record per each day). Open hours acts as a filter. WFM does not use the **Start Time** and **End Time** in the **Select Dates** page of the **Import Wizard**.
>
> If the 15-, 30-, or 60-minute timestep is selected, data from the import file is filtered using the **Start Date and Time** and **End Date and Time**.

6. From the **Locale for Import** drop-down list, select the locale.

> ### Tip
> The **Granularity** parameter settings determines if the **Time** data type is offered in the **Data Columns** pane to follow. Locale settings enable the date and time types to be parsed and used in later in the import process.

7. At the top of the pane, click **Next** [>] .
   You can select **Back** at any time is you need to return to the previous pane.

8. In the **Select Data Columns** pane, choose the column separator, either **Character**, **Tab**, or **Space**.
   If you choose **Character**, you must enter a character in this field. For example, a comma.

9. In the **Comments** character field, enter a character that will indicate any lines in the .CSV file that represent comments.
   For example, a hash tag character.

10. In the **Column Mapping to Data** section, map the columns to the type of data you have in your .CSV file.
    The available data type columns are:

    - Date

    - Time

    - Master Forecast IV

    - Master Forecast AHT

    - Historical Data IV

    - Historical Data AHT

    - Calculated Staffing, FTE

    - Calculated Staffing, Manhours

    - Required Staffing, FTE

    - Required Staffing, Manhours

> ### Tip
> Non-historical data statistics are imported to the **Master Forecast**. Specified statistics appear only if the user has appropriate security rights.
>
> Different columns appear in the **Column Mapping to Data** section, depending on the column separator and comments character you use. To view all applicable columns in this section, ensure that you select a separator that matches the one used in your .CSV file.
>
> If you chose an incorrect data type for any column, the **Review Validation** pane opens, with an error message.

11. At the top of the pane, click **Next** [>] .

12. In the **Select Dates** pane, choose one of the following:

    - **Import everything**—To import all of the data in the .CSV file.

    - **Import following date and time range**—To specify the date and time ranges for the data you

        want to import.

13. After choosing either a or b in step 12, select the check boxes next to any days for which you want data
      to be ignored.
      For example, you might use setting to omit data from days when the activity is not open.

      If a date and time range is not selected in step 12, by default the start time and date is the current day
      and 12:00 am and the end time and date is the following day and 12:00 am.

14. At the top of the pane, click **Import** ⏎ .
      The **Information** dialog opens, indicating the data is being uploaded and the progress.

15. Click **Cancel** to end the operation, if necessary.

16. When the **Information** dialog indicates the data upload is done, click **OK**.

Use the **Reports** module to export data and create reports. See **Forecast Report**.