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Workforce Management Web for Supervisors Help

New Forecast Template Dialog

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New Forecast Template Dialog

Use the **New Forecast Template** dialog box to create a new template, but first watch the video.

Link to video

To create a template:

1. Click **New** in the **Forecast Templates List view** toolbar
The New Forecast Template dialog box opens.
2. Enter a **Name** for the template.
3. In the **Associated** drop-down list, select the site for which you are building this template.
4. Click the **Type** drop-down list to select the template type.
See a list of template types below.
5. Select a template from the **Based On** drop-down list If you want to use settings from a previously configured template.
6. Enter a number for the **Initial Value**.
7. If you are creating an overlap template, enter the **Start** and **End dates**.
8. Select the **Activities** that you want to be associated with this template.
Selecting activities enables you to control which templates are used when forecasting for specific activities.
9. Click **OK**.
The forecast template is now available in the Forecast Templates List view.

What Does the Initial Value Represent?

The initial value you enter in **step 6** of the procedure is a minimum value that applies to all timesteps. After you have created the template, edit it to adjust the precise values for each timestep. WFM Web interprets the initial value differently, depending on the type of template. For example, if you are creating an **Interaction Volume** template, the initial value might be 8 (calls per timestep). See **Template Properties: Data** for details.

Forecast Template Types

- **Interaction Volume**—Number of interactions per timestep. When you save historical IV or AHT for a multi-site activity as a template, only multi-site activity data are saved, never the sum of underlying activities.
- **Average Handle Time**—In seconds. See note above.

- **Service Level Percentage**—As a percentage. See [Special Note](#) at end of this topic.
- **Overheads**—As a percentage. See [Special Note](#).
- **Indirectly Occupied Time**—As a percentage. See [Special Note](#).
- **Maximum Occupancy**—As a percentage.
- **Interaction Volume Overlap**—Number of interactions per timestep.
- **Average Handle Time Overlap**—In seconds.
- **Staffing**—Number of agents (full-time equivalents) to be scheduled for each timestep. This can be either calculated by WFM (**Calculated Staffing**) or set by the user (**Required Staffing**), or you can use both **Calculated** and **Required** values in a forecast. See [Special Note](#).
- **Average Speed of Answer**—In seconds. See [Special Note](#).

Special Note

You can create these templates at the business unit level and apply them when building a multi-site activity staffing forecast.