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Workforce Management Supervisor Help

[Templates](#)

12/14/2025

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Templates

Tip

This page describes Templates 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 templates.

WFM Forecast templates help you create forecasts for sites or business units that have little or no historical data. In addition, there are other uses for templates. For example, you can create templates for **service requirements**, such as average speed of answer (ASA), and service level (SL). In those cases, forecast templates are used to apply different values for different periods of the day, instead of using a single value for the whole day.

Use the Forecast templates features to:

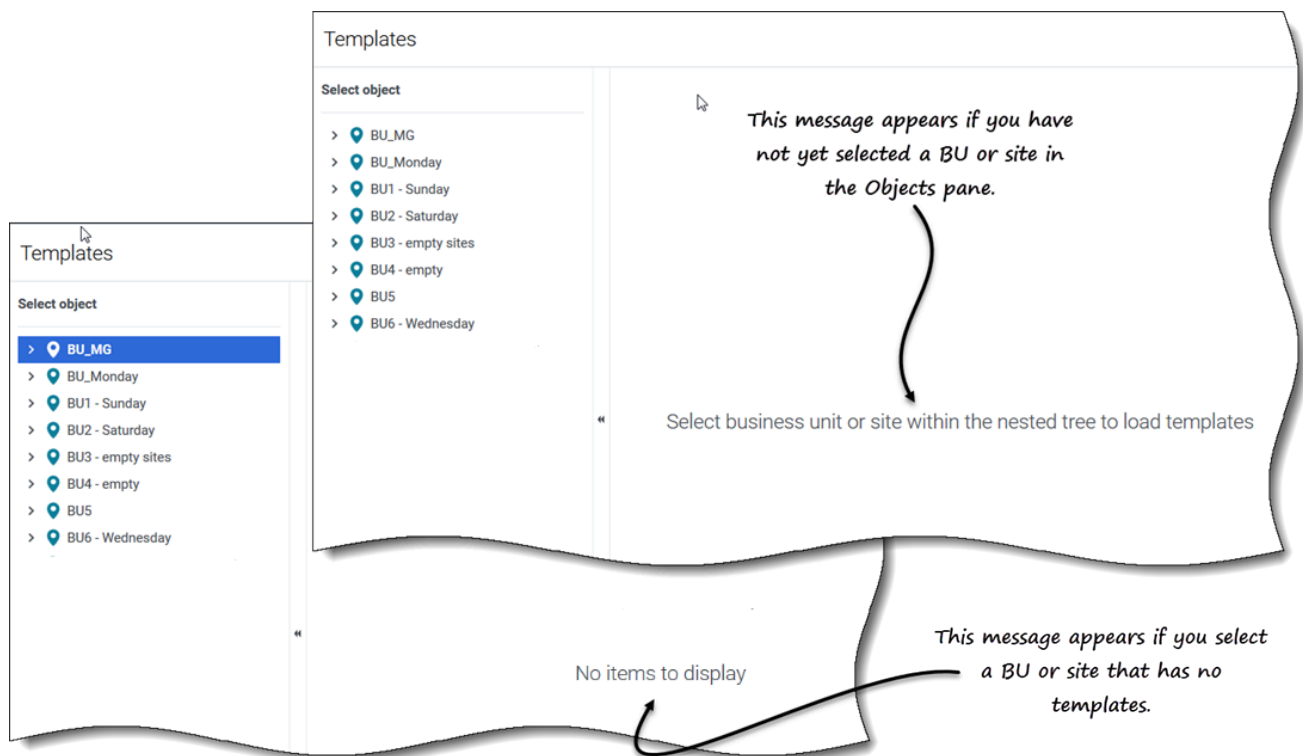
- Select and **manage** forecast templates.
- **Edit** template values and settings.
- View template values in a **graph**.
- **Add or remove activities** within templates.
- **Create** templates.
- Create templates **based on existing data**.

Tip

You must have the access permission to the **Templates** view before you can view, create, or modify templates. See also, the Tip about access permission in [Navigating the Forecast views](#)

When creating templates, you can copy and paste data between a grid and a spreadsheet. For example, you can copy and paste from a **Scenario Volumes view** or **Scenario Staffing view**.

Opening the Templates view



You create, edit, filter, and delete forecast templates in WFM's Forecast module, by selecting **Forecast > Templates**.

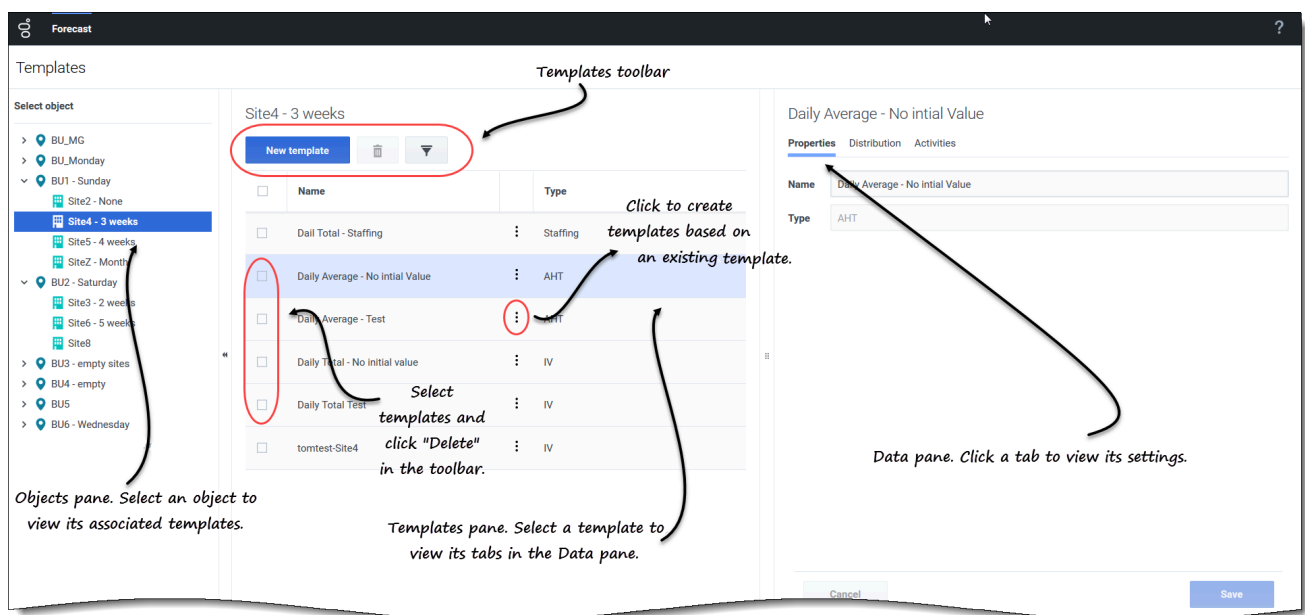
When you open this view initially, you might not see any templates listed (see figure). WFM displays a list of associated templates only after you select a business unit or site in the **Objects** pane.

If no templates exist for the selected object, you'll see the message *No items to display*. Either create a template for the selected object or choose another object to view its templates.

Working in the Templates view

The **Templates** view is split into three panes.

Templates



The **Objects** pane displays a hierarchical list of business units and sites in the enterprise. In this pane:

- Select a business unit or site (by clicking the arrow > beside the business unit) to see a list of templates for the selected object.

The **Templates** pane displays the name of the selected business unit or site and a table containing its templates. In this pane:

- Select an template to display its tabs in the **Data** pane.
- **Create** a template. Click **New template** in the toolbar.
If there are no templates for the selected object, the message *No items to display* appears in the middle of the pane.
- **Delete** templates. Check the boxes to select one or more templates and click **Delete** in the toolbar.
- **Filter** the list of templates to display only the template types you want to see.
- Use the **paging controls** to navigate through lists of templates that are more than one page long.

The **Data** pane displays three tabs: **Properties**, **Distribution**, and **Activities**. In this pane:

- View the settings and controls for any of the three tabs, or change their settings.
The tab settings are described below.

Understanding the template's data

The template data can be viewed and **edited** by using the following three tabs:

Properties tab

Daily Average - Test

Properties Distribution Activities

Name Daily Average - Test

Type AHT

Values in the "Type" field cannot be edited.

Cancel Save

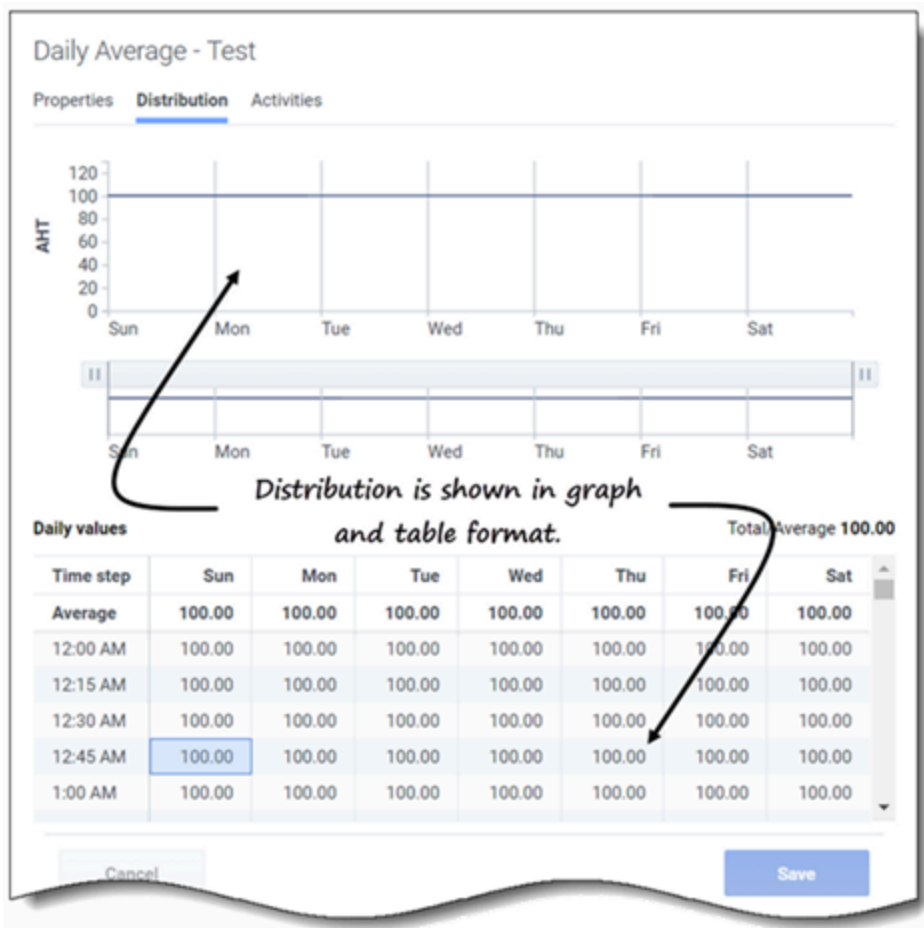
The **Properties** tab contains two fields:

- **Name**—The name of the forecast template.
- **Type**—The template type. You choose the **template type** when you are creating templates. You cannot edit this field.

The **Name** field is editable. Simply enter the new name and click **Save**.

Distribution tab

The **Distribution** tab displays a forecast template's values for a 7-day period in both graphical and table format.



To adjust the graph's displayed time interval, use the horizontal sliders.

The graph adjusts to display only the selected days (to a minimum of 1 day) and divides them into timesteps, according to the number of days that are displayed.

In the grid, use the vertical scroll bar to see the following columns and rows:

- The **Time step** column is divided into 15-minute timesteps.
- The remaining columns show the days of the week.
- The top row shows is either the **Total** or **Average** daily value for each day of the week, depending on the template type you've selected.
- The **Total/Average** daily value is displayed to the far right, above the table.

This cells in the grid are editable. Simply enter new values and click **Save**.

Activities tab

Daily Average - Test

Properties Distribution Activities

Name Daily Average - Test

Type AHT

Values in the "Type" field cannot be edited.

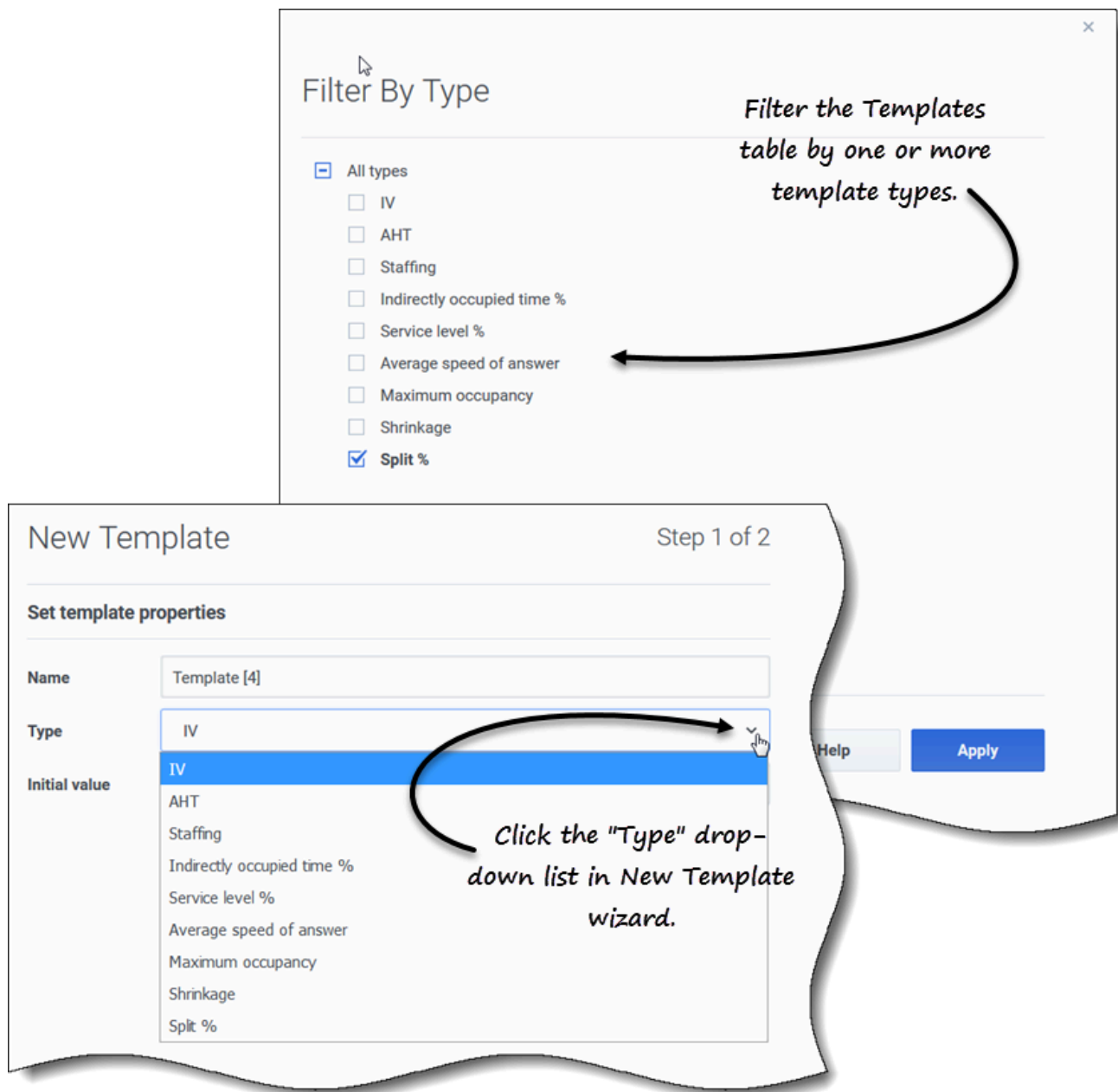
Cancel Save

The **Activities** tab displays the activities associated with a forecast template in a hierarchical format. Clicking the top-most check box selects all of the site's activities.

Activities selection is editable in this tab. Simply select or deselect one or more check boxes and click **Save**.

Selecting a template type

You select the template type when you are **creating templates**. Be sure to use **acceptable values** for each type.



You can filter the **Templates** grid by the following template types:

- **IV**—Represents interaction volumes by the 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.
- **AHT**—Represents the average handle time, in seconds. See the [IV description](#) above.
- **Staffing**—Represented as the 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 [Tip](#).

- **Indirectly occupied time %**—Represented as a percentage. See [Tip](#).
- **Service level %**—Represented as a percentage. See [Tip](#).
- **Average speed of answer**—Represented in seconds. See [Tip](#).
- **Maximum occupancy**—Represents the agent's maximum occupied time, as a percentage.
- **Shrinkage**—Represents the amount of shrinkage or overhead, as a percentage.
- **Split %**—Represents how multi-site activities are split, as a percentage.

Tip

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

Acceptable range of values in templates

Template type	Acceptable values
Interaction volumes (IV)	0 to 999999999
Average handle time (AHT)	0.00 to 999999999.99
Staffing	0 to 999999999
Indirectly occupied time %	0.01 to 99.99
Service level %	0.01 to 100
Average speed of answer (ASA)	0.01 to 999999999.99
Maximum occupancy %	0.01 to 100
Shrinkage %	0.00 to 99.99
Split %	0.00 to 100.00