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Workforce Management Supervisor Help

Required and split staffing methods

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Required and split staffing methods

Workforce Management (WFM) provides different methods to staff (define the number of agents required for) **forecast scenarios**, such as Required and Split Staffing.

Required staffing is a user-defined data series that you build, by using the **Required Staffing wizard**. The **Split Staffing wizard** enables you to split the number of agents required for a multi-site activities (MSA) into specific amounts for each activity within the MSA.

Using required staffing values

Use the **Required Staffing** wizard to define required staffing values in a forecast scenario's **Staffing view**.

Here's what you should know about required staffing and how you can use it:

- Required staffing data is user-defined staffing requirements for a forecast scenario.
- If you have compiled calculated-staffing values, you can set required staffing to the same values as calculated staffing.
- Forecasts can contain both calculated and required data. You can build schedules by using either set of data.
- Required staffing can be composed of a combination of template values, manually entered amounts, and calculated staffing values.

Tip

Before selecting the template in this wizard, **create templates** as needed.

Required Staffing

Select build method

- ☐ Load calculated staffing
- ☐ Load calculated staffing adjusted by 10%
- ☒ Load calculated staffing adjusted using shrinkage 1 selected
- ☐ Use templates

Click "Edit" here to open this dialog.

Select shrinkage profiles

	Name	Type
<input checked="" type="checkbox"/>	Planned	Working overhead
<input type="checkbox"/>	Unplanned	Non working overhead

Click "Edit" here to open this dialog.

Check this check box to select all profiles.

Select Template

Add or remove templates

Add template

Select template

Start date Mon, 1 Jan 2018 End date Mon, 31 Dec 2018 365 day(s)

☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat

Click this down-arrow to open a drop-down list of templates names for selection.


Deselect the check box beside the days that are not applicable.

To set required staffing by using the wizard:

1. In the navigation bar, click **Forecast > Scenarios**.
The Scenarios view opens.

2. Beside the scenario you want to staff, click **Actions**  and then, select **Open**.

3. At the top, near the scenario name, click the **Volumes** drop-down menu and select **Staffing**.

4. In the **Activities** pane, select an activity or multi-site activity and click **Required** .
The Required Staffing wizard opens.

5. Choose one of four build methods:

- Select **Load calculated staffing** to apply calculated staffing to required staffing with no changes.
- Select **Load calculated staffing, adjusted by** and enter a percentage to adjust calculated staffing before applying it to required staffing.
Valid values are from -99 to 999.

- Select **Load calculated staffing adjusted using shrinkage** and click **Edit**  to adjust calculated staffing, before applying it to required staffing.

1. When the **Select shrinkage profile** dialog opens, select the check box beside the profiles you want to use, or select the top-most check box to select all profiles.

2. Click **OK** to return to the **Required Staffing** dialog. The **Load calculated staffing adjusted using shrinkage** field is updated with the number of profiles you selected.

- Select **Use templates** and click **Edit** to apply one or more staffing templates

1. When the **Select Template** dialog opens, click the down arrow in the empty field to select a template.

2. To add another template, click **Add template**.

3. For each template, enter a start and end date, or use the **date selectors** to set these fields.

4. Deselect the check boxes for the week days that are not applicable.

5. Click **OK** to return to the **Required Staffing** dialog. The **Use templates** field is updated with the number of templates you selected.

6. Click **Load**.

7. When the loading process is complete, click **OK**.

Splitting the staffing data

Use the **Staffing Split Wizard** to split staffing from a multi-site activity **Staffing forecast** scenario.

A multi-site activity (virtual activity set) has one or more associated activities (existing activities). After building calculated and required staffing for a multi-site activity, you can then use this wizard to

split the result between associated activities.

Tip

The **Staffing Split Wizard** is available only within a **Forecast Scenario**. You must add a multi-site activity to the forecast scenario for them to be available for splitting in **Staffing Split Wizard**.

Split Staffing - Step 1 of 3

Select multi-site activities to split

- ☐ BU_Monday
- ☒ BU1 - Sunday
 - ☐ Deferred MSA
 - ☐ Deferred MSA 2
 - ☐ Deferred MSA 3
 - ☐ Fixed-Staff Multi-Site Activity
 - ☒ New Multi-Site Activity (1495237885973)
- ☐ BU2 - Saturday

If checked, WFM considers AHT forecasts when performing the split.

Split Staffing - Step 2 of 3

Select activities within multi-site activities

- ☒ BU1 - Sunday
 - ☒ Site2 - None
 - ☒ #free activity
 - ☒ Fixed-Staff Activity 02
 - ☒ Site5 - 4 weeks
 - ☒ #free activity %^

Select activities.

☐ Use AHT forecast

Split Staffing - Step 3 of 3

Specify budgeting data

☒ Working hours 07:00 ☒ Hourly wages \$8

Site	Activity	Working hours	Hourly wage
Site2 - None	#free activity	07:00	\$8
Site2 - None	Fixed-Staff Activity 02	07:00	\$8
Site5 - 4 weeks	#free activity %^	07:00	\$8


Check top row check boxes and enter values to "Set all" activities at once with the same values.

Alternatively, enter values for each activity, individually.


If checked, WFM also splits required staffing.

☒ Split required also

To split staffing for a multi-site activity:

1. In the navigation bar, click **Forecast > Scenarios**.
The Scenarios view opens.
2. Beside the scenario you want to staff, click **Actions**  and then, select **Open**.

3. At the top, near the scenario name, click the **Volumes** drop-down menu and select **Staffing**.

4. In the **Activities** pane, select multi-site activity and click **Split** .
The Split Staffing wizard opens.

5. Using the check box, select the multi-site activity that you want to be split between associated activities.

You can select several multi-site activities within the same business unit.

6. Select **Use AHT forecast** if you want WFM Web to consider average handling time forecasts when performing the split and then, click **Next**.

Step 2 of the wizard opens.

7. At the bottom of the pane, select **Split required also**, if you also want to split required staffing.

8. Select the local (target) activities into which you want to split the multi-site activities and then, click **Next**.

Step 3 of the wizard, Specify budgeting data, opens.

9. If you want each activity to have the same values, in the top row:

1. Select and enter the **Working hours** (paid hours per day).
2. Select and enter the **Hourly wages**.
3. Click **Set all**.

10. If you want activities to have different values, enter **Working hours** and **Hourly wages** for each activity, individually.

11. Click **Split**.

WFM Web displays a progress dialog while it splits the activities.

12. When the split process is complete, click **OK**.

You can click **Cancel** in this dialog at any time, if you want to cancel the split.