CommunityWFM
A RingCentral company

Getting Started with Forecasting > Scheduling > Publishing

A step-by-step guide to basic forecasting, schedule creation, and schedule publishing in WFM

Version 2026

3400 Waterview Parkway
Suite 325
Richardson, TX 75080

Phone 877-668-6870
Web CommunityWFM.com

This document will guide you through using historical data from your system to create accurate forecasts, then using this forecast data to create and publish optimized schedules for your agents. This assumes you have created forecast profiles (such as 4-week rolling or last 4 Monday holidays) and that agents have both assigned activities and schedule templates.

Note for Essentials/Standard users: The Essentials edition of CommunityWFM does not include AI forecasting options or working forecasts (instead you will publish a quick forecast).

Best practice: Prior to forecasting, review the last 6 weeks of contact volume data at the activity level to look for trends: Report > Contact volume > Enterprise Model. This will confirm you are using the correct forecast profile when creating your forecast. You may also use AI forecasting, which will use up to the last 5 years of your data to identify trends and may be configured to generate and publish staffing requirements.

We recommend creating schedules for one week at a time / two weeks in advance.

Create a Working Forecast	
Create a working forecast	1. Go to Forecast > Working forecasts.
	2. Select *Click here to create a new forecast.*
	3. Give the forecast a descriptive name and *Save*.
or	**Use an existing Forecast Worksheet**
Navigate to an existing Forecast Worksheet	1. Go to Forecast > Working forecasts.
	2. Find and open the working forecast (likely the one with the greatest number of current revisions).
	3. Click the name of the working forecast to open the forecast worksheet.
Best practice Create one working forecast to use throughout the year. This is much more efficient and will help keep everything in one bucket. If you have 17 activities, you generate your CV and AHT all at once then revise individual activities, if needed.	

Working Forecast Contact Volume	
Generate forecast data	
This process generates the expected 15-minute interval call volume and average handle time for the date range, based on historical data.	1. In the navigation pane under Working Forecast Contact Volume, click *Generate forecast data*.
	2. Select the activity (site) and forecast dates—typically two weeks in advance, one week at a time. Click *Next*.
	3. Pick a forecast profile from the list. Click *Select* then *Next*.
	4. Click *Next* again.
	5. Click *Import data* then when finished click *Next*.
	6. Select *Classic Community Forecast*. Click *Next* then click *Next* again.
	7. Click *Generate forecast* and when complete click *Finish*.
Confirm and verify the forecast data.	8. Select *View forecast reports*. The report opens in a new browser window.
	9. In the options panel, select the activity (site) and date range.
	10. Click *Apply options*.
	11. Review the contact volume and AHT results to confirm that there is data present and that it makes sense.
	12. When finished, close the browser tab, and return to the Forecast Worksheet.

Working Forecast Staffing Requirements	
Generate clusters	
This generates clusters for things like cross-training.	13. Remain on the working forecast worksheet. (Forecast > Working forecast > open the working forecast).

	14. In the navigation pane under Working Forecast Staffing Requirements, click *Generate clusters*.
	15. Leave drop-down as Agent activity assignments. Click *Generate clusters*.
	16. Click *Finish*.
Generate forecast	
This generates the agent staffing requirements at 15-minute intervals for the selected data range.	17. In the navigation pane under Working Forecast Staffing requirements, click *Generate forecast*.
	18. In the pop-up window select the activity/site and date range then click *Next*.
	19. Click *Next* to use the default service metrics from the Enterprise Model (EM). Click the pencil icon to edit.
	20. Click *Next* to include the defaults for shrinkage from the EM. Click the pencil icon to edit.
	21. The system generates the forecast data. When complete click *Finish*.
Confirm and verify the staffing requirements.	22. In the navigation pane under Working Forecast Staffing requirements, click *View forecast reports*.
	23. Select the site and date range then click *Apply options*.
	24. Select the *Staffing Hours* tab in the report to view more data and verify the Total Adjusted FTEs.
	25. When finished, close the browser window to return to the Forecast worksheet.
Publish forecast data	
This publishes the forecast so the data can be used in creating schedules.	26. In the navigation pane under Working Forecast Staffing requirements, click *Publish forecast data*.
	27. Select the site and date range.
	28. Click *Publish Forecast* then click *Finish*.

AI Forecasting

Enable the forecasting service	
This allows the service to run in the background.	Navigate to Settings > Application settings > Administrative settings > Services and click *Automated Forecast Service*.
	Service enabled? Select Yes to enable AI forecasting to run in the background.
	Impersonated user id: Select from the list of supervisor or higher people. There must be a designated user ID for the service to run. (Recommended: Service Account)
	Start time: This time is in UTC (Universal Time Coordinated). Select a time that is usually slow for your center to run this background service. Each day the service will run at the selected time and check if there are any pending forecasts to be run that day. If there are pending forecasts, they will run at this time. Visit https://www.utctime.net/utc-time-zone-converter
Set up the AI Forecast	
	Access the AI Forecasting feature through the AI main menu option. Select the submenu link *Automated forecasting* or *Set up automated AI Forecasts* in the tile.
	Select *Click here to create a new AI automated forecast* then follow the Steps to Success: Setup | Forecast recurrence | Machine learning.
Basic Properties	**Name:** Give your AI forecast a name and optional description.
	Selected activity: Select an activity. A higher level with many included activities will take longer to run.

	Generate/publish staffing requirements? Select whether to generate staffing requirements, and whether to publish staffing requirements. • **Do not generate staffing requirements.** • **Generate staffing requirements, but do not publish:** This will create a working forecast with staffing requirements in Forecast > Working forecasts. You will need to manually publish the forecast before it will be available to use in a working schedule. • **Generate staffing requirements and publish:** The staffing requirements are published and available to use in a working schedule.
	Enabled? Select *Enable* to allow this AI forecast to run when scheduled. Each time the service runs, it will create a new revision of this working forecast.
Forecast recurrence	Parameters entered here determine how often and on what schedule the forecast will run, when the forecast starts after the release date, and how many days are included in the forecast.
	Next forecast release date: The date the forecast data will be available. The forecast engine will use all historical data up to this date to create the forecast. This date must be in the future (tomorrow or later).
	Recurrence pattern: Options include daily, weekly, monthly by day of month (e.g., on the 1st of the month), and monthly by day & week of month (e.g., every second Friday). The next options will change based on the selected recurrence pattern.

	Forecast recurrence interval: Enter a frequency. The interval options are based on your selected recurrence pattern.
	Forecast offset (# of days after forecast release date): Number of days after the release date to start the forecast. Must be between 1 and 15 days and less than the forecast horizon. For example, you may release a forecast on Friday that forecasts for dates starting on Monday (3 day offset).
	Forecast horizon (# of days after forecast release date): Number of days after the release date to end the forecast. Must be 35 days or fewer and greater than the forecast offset.
	Preview Upcoming Dates: Click to preview the next five forecast dates based on the selections.
	When the recurrence parameters are complete, the tiles on the worksheet will turn green.
Machine Learning	Use the Automated Forecast Data Integrity Report to examine the forecast model data used to train this automated forecast. Use the tiles at the top of the page to examine individual parts of the data in your model. Yellow flags indicate a higher degree of urgency or need for human review, but will not prevent running the forecast.
	Verify Dates: Collecting more historical events improves seasonality predictions (yearly, monthly, weekly trends). Stale data could affect the prediction accuracy with possible uncertainty similar to starting over with no data. This will be Valid / green if there are 365 days of data AND new data within the last 7 days. If **any** activities do not meet this criteria, the icon for Valid? will be yellow, but you can proceed.

	Data Completeness: Missing data not reported/collected will affect prediction accuracy. This is Valid / green if the Collection Percent is ≥ 90. If **any** activities do not meet this threshold, the icon for Valid? will be yellow, but you can proceed.
	Data Consistency: Is any data outside the standard deviation for call volume/AHT? This is Valid / green if the contact volume relative standard deviation is ≤ 30 AND AHT relative standard deviation is ≤ 30. If **any** activities do not meet this, the icon for Valid? will be yellow, but you can proceed.
Data integrity report	In this section you can view a graph of your call volume/AHT for an activity with an overlay of standard deviations. Click an activity name to generate the report and review the data. The wider the band in the graph, the more volatile your call volume/AHT for that interval. This allows you to identify areas of concern. As with many graphs, you can click and drag to zoom in on a date range.
Manage existing forecasts	
View, enable, disable existing AI forecasts	View a list of existing automated forecasts including the name, description, activity, next forecast release date, next forecast period, and the status (enabled or not). This is where you can enable or disable an automated forecast by clicking the toggle, or delete disabled forecasts (enabled forecasts cannot be deleted).
	If the next forecast release date has *Pending further work*, dates have not been selected, and the forecast cannot be enabled. Click the name of the forecast to go to the setup page.

View working forecasts	
	When viewing the list of working forecasts (Forecast > Working forecasts), generated AI forecasts include the forecast description with the forecast name, date generated, forecast dates, and number of revisions.
	Each time the service runs, it will create a new revision of this working forecast. Click the forecast description to enter the working forecast worksheet. **Review then publish the AI forecast.** If you selected *Generate staffing requirements and publish* in the AI forecast setup, you do not need to publish the forecast here. The AI forecast is now available to use in a working schedule.

Create the Working Schedule	
Set up the basic properties of the new schedule.	1. Go to Schedule > Working schedules.
	2. Select *Click here to create new working schedules.* Unlike the working forecast, **create a new working schedule for each week**.
	3. Select the activity/site and enter a name. **Best practice**: include the schedule date in the name.
	4. Be sure the box is checked to automatically include a reference to this week's published forecast.
	5. Click *Next.*
Define the dates for the schedule.	6. Click any day of the week within the week of your schedule. This will select the entire week.
	7. Click *Next.*
	8. Click the *From Date* or *Through Date* to open the schedule worksheet.
Schedule Worksheet	
Note: No need to select or customize participants here (agents are already assigned to activities).	
Add custom hours or closed dates	9. Though inherited from the EM, if your center will be closed or have adjusted hours on a day, select *Custom work habits & hours.* Uncheck any days when the center/an activity is closed. Be sure to *Save.*
Review time off requests from agents	10. Select *Review events and exceptions.* In the options panel, check to include events from the Published schedule, and *Apply options* to run the report.
	11. If necessary, approve, deny, or return to pending any agent requests. When finished, close the report window.
Select forecast data	12. Click *Select forecast data* in the tile or the navigation pane and verify that the date range matches the schedule you are creating.

Generate optimized schedules	13. Click *Generate optimized schedules* in the tile or the navigation pane.
	14. If there is a red stop symbol for any setting 🚫 you will need to fix the conflict before generating the schedule. A yellow triangle with an exclamation point ⚠ is a warning (e.g., there is an activity without an agent assigned) but you can continue. If you make changes, click *Re-verify Schedule* before proceeding.
	15. Click *Generate Schedule.*
	16. In the pop-up window click *Go.* The system will create schedules based on the published forecast. When complete, you'll see a green box with *Success.*
	17. Review the schedule metrics in the pop-up then close the window.
Manage agent schedules	18. Select *Manage agent schedules* in the navigation pane then click *Apply options* to run the report. **Pro tip:** If the schedule loads but the net line statistics at the top of the page never loads, you don't have a published forecast for that week.
	19. Review the schedule for each day and adjust if needed (e.g., add meetings and training). When finished, close the window.
Publish the Working Schedule	
Publish the schedule	20. Click *Publish this schedule* under Working Schedule Extras.
	21. In the pop-up window, add a required comment then click *Next.* **Best practice:** include the reasons for any major schedule adjustments.
	22. Review the table for errors (🚫) then click *Next.* If you see a 🚫, it means those activities already have an associated published schedule (e.g., when an agent has cross-training in > 1 activity), and you may need to unpublish those schedules first, then publish at the next higher level to cover the cross-training activities.
	23. When published, you'll see a confirmation message. Click *Finish.*

Agents will receive a notification that there is a new published schedule with a link to review their schedule.

Note: If you need to adjust the schedule, be sure to make the edits in the **published** schedule (Schedule > Published schedule **OR** Report > Published schedule > Schedule details > Enterprise model) and not the working schedule. Once published, there is no link between the working and published schedules.

FAQs

Why didn't an agent receive a schedule?

There are a few reasons why an agent might not receive a schedule. Here are a few things to check:

- Does the agent have assigned Activities?
- Does the agent have an assigned Schedule Template, with a proper effective date?
- Is the Schedule Template assigned to the agent built correctly?
- Is the agent's application role (in Basic Properties) set to 'Agent'?

Why aren't agents notified of schedule changes?

There are no notifications from the **working** schedule. Notifications are **not** automatically sent to an agent when you edit an event in the **published** schedule. To enable notifications, you must run the report and select *Yes, send notifications for all schedule changes* from the *Enable notifications for schedule changes?* drop-down menu.
You must change this setting each time you run the report.

How do I unpublish a schedule?

Navigate to Schedule > Published schedule. In the left side navigation, expand the section for Utility Schedule Reports and select *Published Schedule Audit Report.* Find the schedule week then click *Un-publish.*