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## Decisions Forecasting Help

[View and Edit Forecasts](#)

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## View and Edit Forecasts

To view and edit (modify) forecasts, you must first open a forecast scenario from the list of scenarios that display on the Genesys Decisions Forecast application's home page. The scenario opens in a page in which you can view and modify the individual forecasts. The forecast viewing/editing page shows you the results that the forecast service produced. On this page, you can also **modify the results** based on business drivers.

If you are getting started with the Decisions Forecast module, Genesys recommends that you watch the following video. The video shows you a sample forecast scenario and describes how to apply modifications to adjust the forecast data.

[Link to video](#)

### Overview of the Forecast Viewing and Editing Page

The following menu items display in the graph/grid area of the page:

- **Create Modification**
  - Opens the **New Forecast Modification wizard**.
- **Show outliers identified in historical data:**
  - Shows or hides outliers in the selected forecast scenario.
- **Add or view comments**
  - View and/or add comments about this forecast.
- **View Metadata**
  - View additional information about the metadata for the selected forecast scenario such as the forecast model used for the results, the parameters selected for that model, the forecast error, and the points that were designated as outliers and missing.
- **Export**
  - Export the forecast scenario data and save it as a Microsoft Excel file.

In addition, the following menu items display at the top right of the forecast viewing/editing page:

- **Save and Save As**
  - Save changes to modifications.
- **Back**
  - Returns you to the Forecast home page.

## Overview of the Forecast Viewing/Editing Page

There are five major sections to the forecast viewing/editing page:

- Metrics/Dimensions selection (left)
- Modification pane (right)
- Graph (top middle)
- Grid (bottom middle)
- Menu items (upper right)

When the page first loads, there is nothing displayed in the grid or the graph. You must make selections in the **Metrics** and **Dimensions** areas in order to display forecast data. The list of metrics is all of the metrics that were selected when the forecast scenario was created using the **New Forecast Scenario wizard**. Once you select a metric, then the list of dimensions is populated. The dimensions shown in the list are based on the metric that you selected, as well as the Contact Groups that were selected when the forecast scenario was created. Once you have selected a metric/dimension combination, the grid and graph sections are populated.

The graph is the graphical representation of the forecast data. The grid shows the same data as the graph, but in tabular form. Both the graph and the grid can show any or all of the series data at the same time. Hover over a point on the graph to display all of the data for the visible series for that specific date.

The grid and graph are two different visualizations of the same underlying data. There are five distinct series:

- History
  - The actual history sent to the forecast service.
- Fitted\*
  - How accurate a method is when using available historical data ("training" data).
- Cross Validation\*
  - Measures the accuracy of a forecast. Specifically, it tells you how well a method is performing (how accurate it is) when run against data that it has not seen before ("test" data).
- Base Forecast
  - The actual results from the forecast service.
- Total Forecast
  - The series includes all modifications that have been applied.

\* To measure the accuracy of a forecast, Decisions divides time series data into two sets: training and test data. Training data is used for a method to be fitted and test data is used to test the accuracy of the forecast of a method.

Click the radio button beside each individual series to toggle that series on and off. If a series is deselected (off), the series will be hidden on both the grid and graph.

The Total Forecast value consists of the base forecast plus or minus all **modifications** that are applied to the individual forecast. The graph shows only the total forecast line, while the grid shows the total forecast values plus all of the values that are produced by each modification.

Use the timeline slider between the graph and the grid to zoom in on a specific time period. The grid and graph will display the data from the selected time period.

## Using the Modification Panel

The **Modification** pane is a slide-out panel from the right side of the page. The pane contains information about all of the modifications that pertain to the selected metric and dimension combination. Each modification is shown as a separate “card” in the list. By default, each card shows only the title, but the cards can be expanded to show more information about the modification. Use the action menu at the top of the pane (⋮) to select the type of information that you would like to see for each modification. You can also choose to expand all of the modification information that displays in the pane. Select or deselect each check box to display the associated information or to hide it.

Modification information that you can view in the **Modifications** pane:

- Start and end Dates
  - Modification applies to only these dates.
- Modification Parameters
  - Method and amount of the modification
- Dimensions
  - All of the dimensions to which the modification applies. It can apply to multiple dimensions simultaneously.
- Metrics
  - All of the metrics to which the modification applies. It can apply to multiple metrics simultaneously.
- Last Modified by
  - Who last modified the modification and when.
- Created by
  - Who created the modification and when.

Use the toggle button at the top of the **Modifications** pane (  ) to show or hide the disabled modifications.

Each modification card includes an action menu. The menu has options that let you edit or delete the modification. The **Edit** option opens the same wizard that was used to create the modification, and it is pre-populated with the current information. The Delete option deletes the modification; it will no longer be in the system.

You can change the order of the modifications by dragging and dropping them, however a change in the order affects the calculated values. For example:

- Base Forecast: 1000
- Modification 1: Add 10% 100
- Modification 2: Maximum 1050
- Total Forecast = 1050

If you swap the order in which you make the modifications, you get the following result:

- Base Forecast: 1000
- Modification 2: Maximum 1050
- Modification 1: Add 10% 105
- Total Forecast = 1155