Decisions Forecasting Help

Decisions 9.0.0

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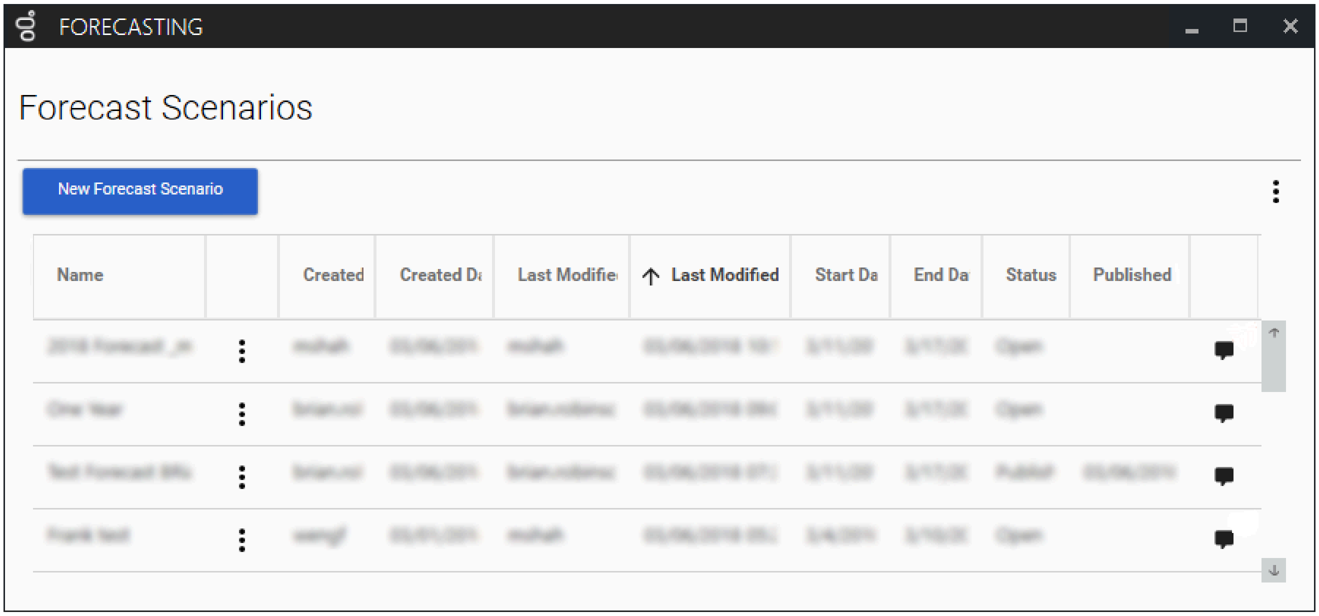
Decisions Forecasting



Welcome to the Help documentation for the Genesys Decisions Forecasting application.

Genesys Decisions is a strategic planning tool designed specifically to help contact centers make better plans and budgets. Genesys Decisions helps contact center managers accurately predict future performance and reveal the operational impact of various what-if scenarios and assumptions. Prediction of long-term operational performance takes into account the impact of contact volumes, attrition, service levels, and other key factors.

Are you new to Genesys Decisions Forecast? See Getting Started.

Are you looking for answers to specific questions? Try these topics:

- Creating a Forecast Scenario
- View and Edit Forecasts
- Modifying Forecasts
- Publishing a Forecast Scenario
- Applying a Forecast Scenario to your Planning Scenario

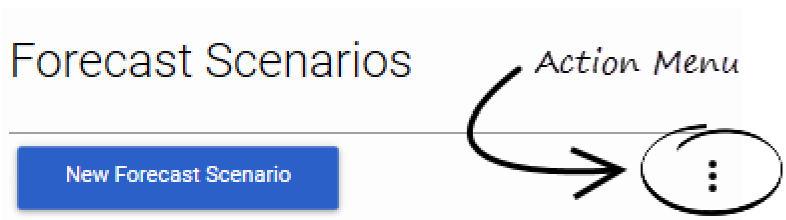
Getting Started with Genesys Decisions Forecast

When you open the Genesys Decisions Forecast application, you see the list of forecasts that have been created for your organization. This is the main page – or home page – for the application. The default view for the page shows only the forecasts that are enabled. Until you change the sort order, the forecasts are sorted based on the last time that each was modified.

In addition to the content on this page, the following video provides an overview of the Decisions Forecasting module. The video shows you a sample forecast scenario and describes how to apply modifications to adjust the forecast data.

Link to video

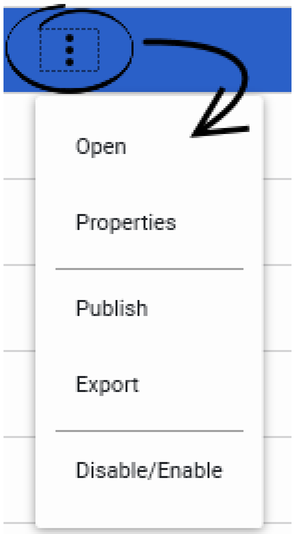
Main Action Menu



There is an action menu at the top of the **Forecast Scenarios** table on the **Forecast** application's home page (see the figure). From this menu, you can select actions that impact the table:

- Show/hide each column
- Refresh Forecasts
- Show Disabled Forecasts
- Close the form

Actions Specific to a Forecast Scenario



In addition to the action menu at the top of the **Forecast Scenarios** table, there is an action menu within each row of the table. This action menu impacts only the forecast scenario with which it is associated. Actions specific to a forecast scenario include the following:

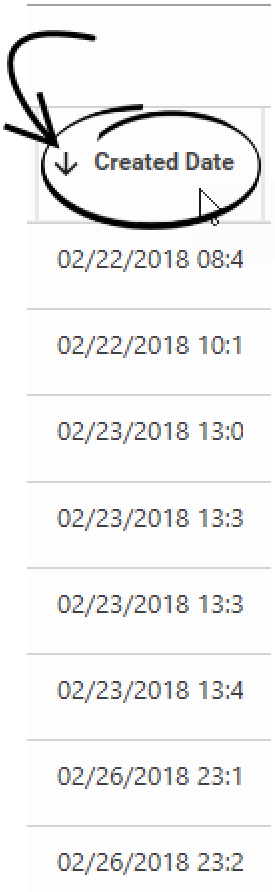
- Open: Opens the selected forecast scenario. Once opened, you can view data for each forecast. You can also modify the forecasts, if required.
- Properties: Shows all of the currently-selected options for the forecast. You can change the properties, as necessary.
- Publish: Publishes the selected forecast. Publish the forecast to make it available to be applied to a Decisions Planning Scenario. You cannot change published forecasts. If you need to make a change to a forecast after it has been published, make a copy and work with that.
- Export: Exports the forecast information and results to an Excel file.
- Disable/Enable: Disables a forecast. Once disabled, you cannot open, publish, or edit that forecast scenario. In addition, the forecast scenario will no longer display, by default, in the **Forecast Scenarios** table on the home page. To re-enable a disabled forecast scenario, first select **Show Disabled Forecasts** from the action menu at the top of the **Forecast Scenarios** table, and then use the action menu that is specific to the disabled scenario to enable it.

Working with Columns in the Forecast Scenarios Table

You can manipulate the columns and the data in the **Forecast Scenarios** table to better display what is most relevant to you. For example, you can use the column header row at the top of the **Forecast Scenarios** table to sort data and organize the content.

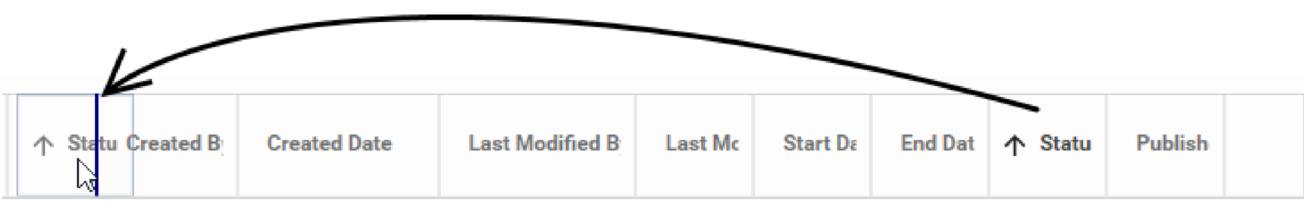
Sorting Data in Columns

In the **Forecast Scenarios** table, click a column heading to sort the data in ascending or descending order. An arrow displays in the column header to indicate the order (see the following figure).

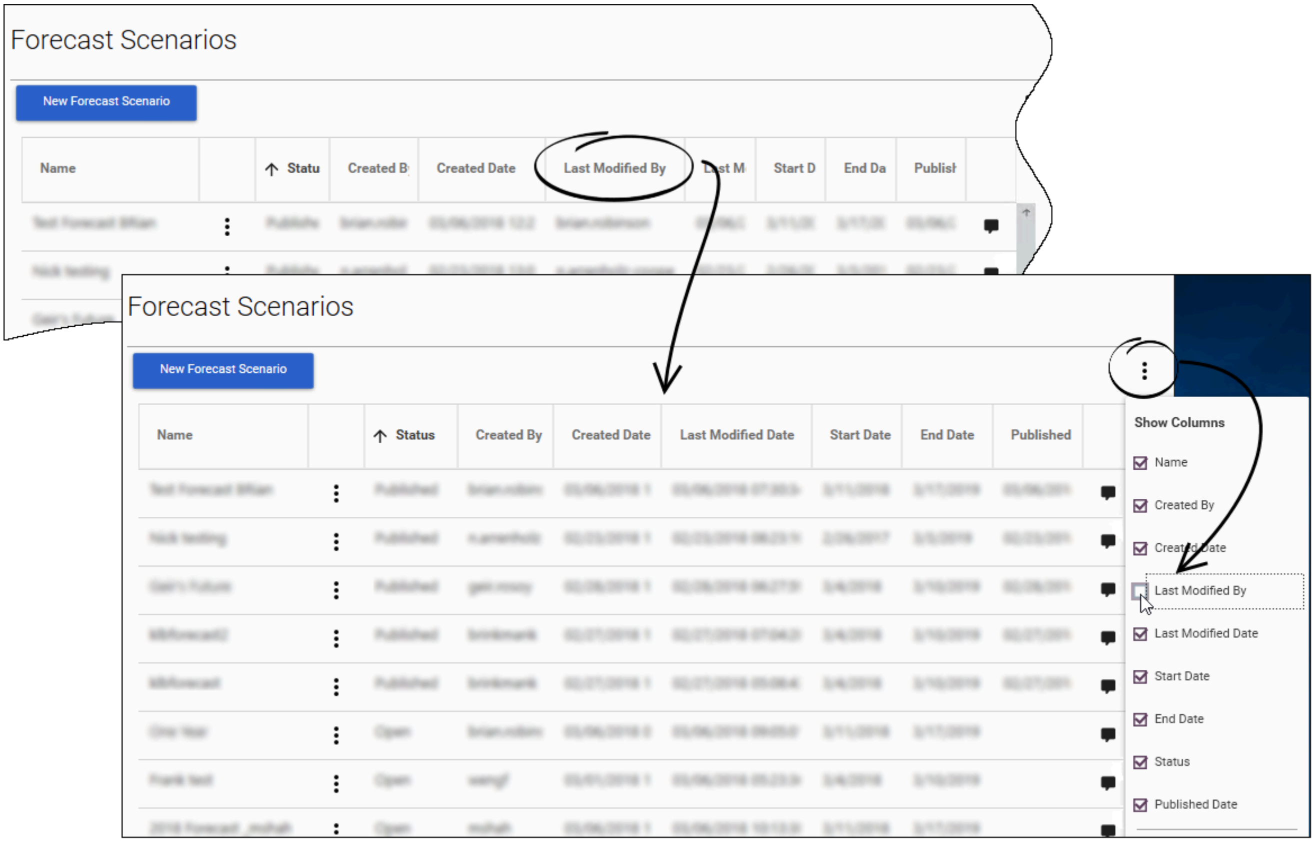


Arrange Columns

You can move columns around in the **Forecast Scenarios** table. Click a column heading and drag it to the desired location in the **Forecast Scenarios** table. For example, you might want the **Status** column to display at the left side of the table, instead of the far right (see the following figure).



Hide or Show Columns

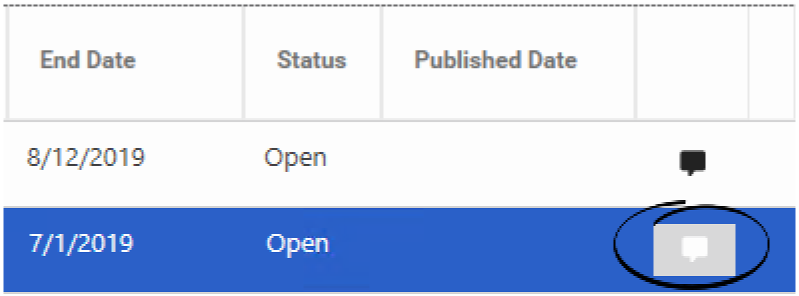


You can hide or show columns, depending on the type of information that matters to you. For example, in the figure to the left, the user is hiding the **Last Modified By** column. Hiding unnecessary columns is a good way to focus on relevant information. Alternatively, if this column is hidden, but you think that the information is relevant to what you are doing, then select the check box beside the **Last Modified By** column in the main action menu to add that column to the table again.

Viewing and Adding Comments to Forecasts

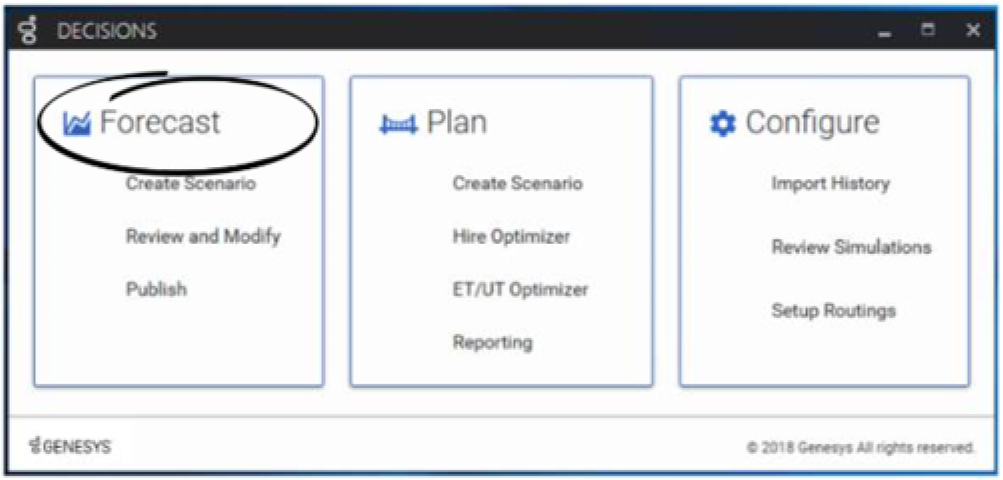
You can add comments and notes to forecasts in the **Forecast Scenarios** table on the **Forecast** application's home page. Click the "Comments" icon () beside a forecast on which you want to comment. In the **Comments** pane that opens, click **New Comments**, and enter your comment. Click **Add** to add it to the forecast.

Click the Comments icon to open the **Comments** pane and view the comments and, optionally, to add your own notes. The following figure shows the open **Comments** pane.


End Date
Status
Published Date
8/12/2019
Open
7/1/2019
Open

Creating a Forecast Scenario

Open the Genesys Decisions Forecast application from the Decisions hub.



The Forecast home page opens and existing forecast scenarios display in table format. If you have not selected the option to show disabled forecast scenarios, then you will see only enabled forecasts.

At the top of the Forecast home page, click **New Forecast Scenario** (

). The **New Forecast Scenario** wizard opens.

A forecast scenario is a group of individual forecast series for a given amount of time. Each forecast scenario must have a unique name so that it can be identified by you and other users in your organization. You must enter the time frame for the forecasts when you create a new forecast scenario. The same start and end dates are used for each forecast in the forecast scenario.

Tip

You can use the **Advanced Setting** on the first page of the **New Forecast Scenario** creation wizard to override the selected history start date, however Genesys recommends that you use this option only in cases where the results of the forecasts might be skewed because of the inclusion of invalid data. For example, if your environment changed significantly at some point during the range of the forecasts that you are creating – more precisely, the mapping has changed significantly – then the data that was collected before the date of the change might be invalid. In this case, you would override the selected history date in order to filter out the older, invalid data.

You must also select the Decisions routing. The routing selection determines which Decisions Contact Groups will be available for selection on the second page of the wizard. The selection of Contact

Groups defines the dimensions that will be used to create the individual forecasts.

Finally, you must select the metrics for which you wish to see forecasts. A unique forecast is created for each combination of metric and dimension.

Once the wizard is finished, a page opens in which you select, view, and modify the individual forecasts.

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

Modifying Forecasts

To 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 individual forecasts. You can apply the modification to any combination of metrics and dimensions.

On the forecast viewing/editing page, click the pencil icon () to open the **New Forecast Modification** wizard. Use the wizard to make your modification to a forecast. You must give each modification a unique name in the given forecast scenario. Choose a meaningful name for the modification so it will be easy to recognize the differences between similar modifications that you have applied to different metrics and dimensions.

The start and end dates that display, by default, in the **New Forecast Modification** wizard are the dates shown on the forecast viewing/editing page. Change the dates to reflect the time range that interests you.

There are eleven modification types from which you make your selection:

- Grow/Shrink each point by percent
  - Every point in the date range will be increased/decreased by the percentage that you enter.
- Grow/Shrink each point by value
  - Every point in the date range will be increased/decreased by the value that you enter, distributed evenly over the date range. To decrease values, enter a negative number.
- Compound Grow/Shrink each point by percent
  - The value that you enter will be divided by the total periods in the range. The first period will be increased/decreased by that percentage. The second period by 2X that percentage, and so on.
- Compound Grow/Shrink each point by value
  - The value that you enter will be divided by the total periods in the range. The first period will be increased/decreased by that value. The second period by 2X that value, and so on.
- Evenly distribute value to each point
  - Every point in the date range will be increased/decreased by the value that you enter.
- Maximum value per interval
  - No point in the range will exceed the maximum.
- Minimum value per interval
  - No point in the range will fall below the minimum.
- Make each point the evenly distributed value
  - The value that you enter will be distributed evenly over the range and assigned to every point in the range.
- Make each point the value

    - The value that you enter will be assigned to every point in the range.
- Campaign based metrics
    - Each point in the range will be adjusted based on the number of impressions, the response rate, and the response distribution by week.
- Customer based metrics
    - Each point in the range will be adjusted based on the number of customers by week and response rate by week.

The **New Forecast Modification** wizard selects, by default, the metric that you had selected on the forecast viewing/editing page. You can change this and select one or more metrics to which the modification will be applied.

The **New Forecast Modification** wizard selects, by default, the dimension that you had selected on the forecast viewing/editing page. You can change this and select one or more dimensions. The modification will be applied to each selected dimension and metric combination.

Publishing a Forecast Scenario

Previously-created forecast scenarios display in table format on the home page of the Genesys Decisions Forecast application. You can apply a forecast scenario to a planning scenario in the Genesys Decisions Planning application only if the forecast is published. You publish a forecast scenario in the Decisions Forecast application. You apply the forecast scenario to a planning scenario in the Decisions Planning application.

To publish a scenario, select **Publish** from the scenario's action menu.

Once published, the forecast scenario is frozen and you can no longer save changes to that scenario. If you need to make a change to a forecast scenario after it has been published, make a copy and work with that. The copy must have a different name than the published forecast scenario. The copy can eventually be published, as well, and applied to the planning scenarios.

Applying a Forecast Scenario to your Planning Scenario

You apply a forecast scenario to a planning scenario in the Decisions Planning application. The forecast scenario must be published before you can apply it to a planning scenario.

In the Decisions Planning application, either click the **Forecast** button or use the **Input** > **Forecast** menu to open the **Apply Forecast Scenario** window. The list of forecast scenarios contains those that have been published, are enabled, and are for the same Decisions routing as the planning scenario in which you are currently working.

Select the forecast scenario that you would like to apply to your plan, and click **Apply**. The Total Forecast values for each metric/dimension combination in the forecast scenario are populated in the planning scenario. This process overwrites any values that are currently in the planning scenario. Any metric/dimension combinations that are in the planning scenario, but not in the forecast scenario, will not be modified.

Additional Actions in the Apply Forecast Scenario Window

Click the ellipse (**...**) next to a forecast scenario's Comments icon () in the **Apply Forecast Scenario** window to see which metrics and Contact Groups are included in that forecast scenario.

Click the Comments icon to open and view the **Comments** pane.

The columns in the table of forecast scenarios can be sorted and moved, similarly to the columns in the Forecast application.

Use the action menu above the table of forecast scenarios, on the right side of the window, to hide/show columns and to refresh the list of forecast scenarios.