Decisions User Help

Budgeting and Variance Analysis

5/8/2025

Budgeting and Variance Analysis

Working with Budgets

If your system administrator has given you security rights, you may save your scenario values as a shared budget in the Genesys Decisions Database that can be used by any Genesys Decisions user for variance analysis purposes.

To save a scenario as a budget:

1. Open the scenario you wish to save as a budget.
2. Click Edit, and then click Work with Budgets. The budgets window will display the saved budgets currently on the server.
   If you don't have Work with Budgets as an option in your Edit menu, contact your Administrator.
3. Click Add to save the current scenario as a budget. The Add Budget window will open.
4. Name the budget, and choose the start and end dates for the weekly and monthly budget (note that the range saved in the budget does not need to include all date ranges in the scenario).
5. Add Notes (required field), and click OK.

To delete a budget:

1. Click Edit, and then click Work with Budgets. The budgets window will display the saved budgets currently on the server.
2. Highlight the budget you wish to delete and click Delete.

Running Variance Analysis Reports

1. Click Results and Variance Analysis. The Variance Analysis Wizard will display.
2. Select a Weekly or Monthly interval for your report and click Next. The Select Comparisons window will display.
3. Select each budget or actual history you wish to work with from the drop down box, set the appropriate start and end dates, and click Add.
   Note that each budget can have a different date range (for example, it is possible to compare January to June of one budget to July to December of another budget, or compare different date ranges for the same budget).
4. When you have selected all the budgets you wish to work with, click **Next**.
   The Select Variance Combinations window will display.
5. From the drop down boxes, select each pair of budgets that you wish to compare and click Add. When done, click Finish. The Variance Analysis Report Template will display.
6. Select the Center, Staff Type, Contact Type, Business Unit and/or Contact Group you wish to work with

from the drop down boxes, the report type (Percentage or Rate/Volume) and type the number of weeks you wish to display the totals for in the Display Total Column of First Weeks or Months, and click Execute to display the report.

Other features in this window include:

- Print
- Export: HTML and Text/Excel
- Wizard: Click the Wizard button on the bar in order to rerun the Variance Analysis Wizard. This will remove current analysis.

When done reviewing the report, click the **Close** button to close the **Variance Analysis** window.