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Genesys Interactive Insights User's Guide

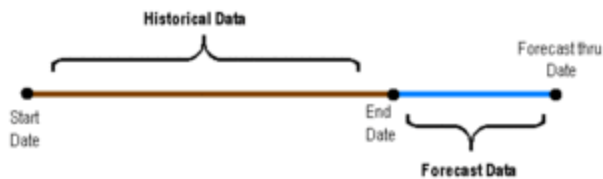
Changing the Forecast

4/2/2025

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Changing the Forecast



Time Ranges for the Interaction Volume Service Type Trend Report

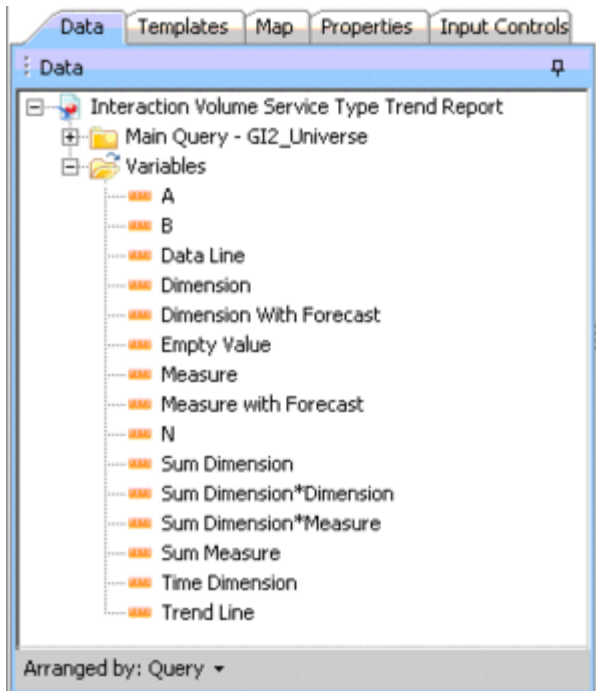
The Interaction Volume Service Type Trend Report (sometimes called the Trend report) provides a forecast of one service-level measure based on the historical values that are retrieved within the time range that is bound by the start and end dates that you specify. The report provides forecasted data beginning from the end date and extending through the forecast-thru date that you specify, as shown in the figure *Time Ranges for the Interaction Volume Service Type Trend Report*. The Interaction Volume Service Type Trend Report uses several variable-based measures (discussed below, under [Swapping the Forecast Measure](#)) to load the terms for a least-squared forecast calculation. These variables are reserved for internal use; alter altered them only as instructed below.

Swapping the Forecast Measure

The report's Measure variable identifies the universe measure that is used to compute the trend. Resetting this variable to another measure will not break the formula. As packaged, the % First Response Service Level measure in the BA Customer class is assigned to this variable. You can customize a copy of the report to provide a forecast of a different measure. To do so, perform the following steps:

[+] Show Steps

1. Choose the measure that you want to substitute—for example, Entered, in the Business Attributes class.
2. Within InfoView, make a copy of the Interaction Volume Service Type Trend Report and retile it accordingly—for example, Interaction Volume Entered Trend Report.
3. From the toolbar, click Edit. Then, click Edit Query.

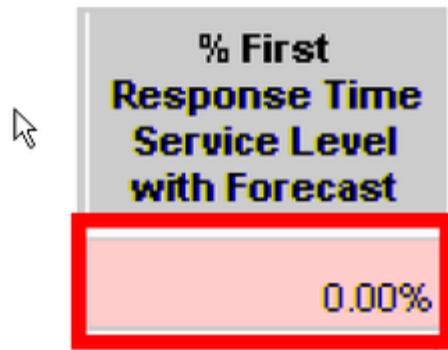


Components of the Interaction Volume Service Type Trend Report

4. In the Query Panel, add the desired measure to both combined queries (Combined Query 1 [for current data] and Combined Query 2 [for forecasted data]). Do not yet remove the % First Response Service Level measure.

The figure *Components of the Interaction Volume Service Type Trend Report* shows components of the Interaction Volume Service Type Trend Report.

5. From the toolbar, click Edit Report.
6. On the Data tab, double-click Measure to open the Variable Editor.
7. In the Formula box of the Editor, replace [% First Response Time Service Level] with the measure that you chose in Step 1 and click OK.



A report cell that has an alerter applied, causing the cell background color to change when an alarm is raised

Alerter

8. If your selected measure yields values that are greater than 1—as is the case with the example Entered, given in Step 1—perform the following steps on the Main tab of the report:
 - a. Set Forecast Alerter (the alerter that is associated with the forecast column, shown in the figure Alerter) appropriately, or remove it altogether.
 - b. Update the legend.
 - c. On the Data tab, double-click the Trend Line variable and change its formula to the following:
If [A] * [Dimension With Forecast] + [B] < 0 Then 0 Else [A] * [Dimension With Forecast] + [B]
9. Appropriately rename any strings that indicate the name of the measure that is to be replaced. On the report's Summary tab, for instance, change the name of the axis, the chart name, and the "% First Response Time Service Level over Time" hardcoded string to Entered over Time in the report's structure.

On the report's Description tab, add the Entered measure and its description to the table. Change the report's description appropriately.

10. (Optional) On the Query Panel, remove any measures that you no longer want to appear in the query.
11. Save and test your report.

Tip

In the GI2 universe, the First Response in Threshold and Entered with

Objective measures (the first two columns of the Trend report) are used to derive % First Response Time Service Level (the third column in the report). If you swap the service-level measure for another, as instructed in the preceding section, you might also want to swap out the first two measures. Be sure to add any new measures to both halves of the report's underlying combined query and set the columns of the main table appropriately.

Managing the Report Dimensions

Among the internal variables of the Interaction Volume Service Type Trend Report are some that parameterize dimensions. This section demonstrates how to modify such variables and the report's structure to reflect different dimensions.

Changing Dimensions Other than Time dimensions

The following abbreviated steps demonstrate how to define additional or fewer dimensions within the report:

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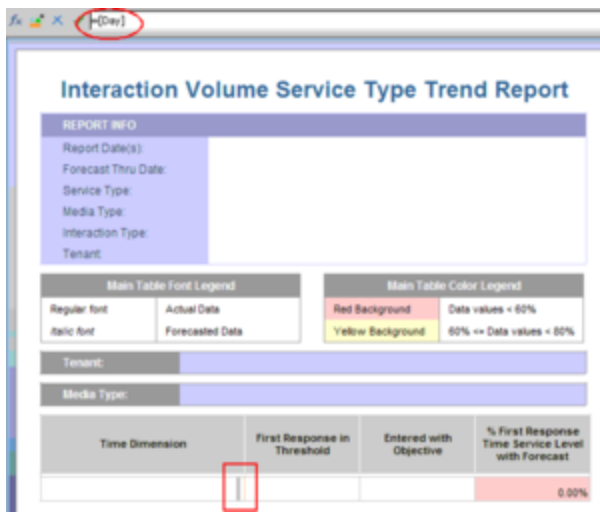
1. In the Query Panel, add the desired dimension to ((or remove it from) both combined queries.
2. On the Data tab, double-click `Dimension With Forecast` to open the variable editor. Change this variable's definition to include or remove the desired dimension. For instance, the following definition adds the Service Type dimension: `=RunningCount([Time Dimension];([Tenant Name];[Media Type];[Service Type]))`
3. Click `View Structure` and modify the report's section as desired.
4. Save and test your report.

Changing Time Dimensions

To change the report's time dimension, perform the following abbreviated steps:

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Changing the Forecast



Hidden Columns in the Trend Report

1. In the Query Panel, add the desired time dimension to both combined queries. For example, add Month. Do not yet remove the Day dimension.
2. From the Data tab, double-click Time Dimension to open the variable editor. Change this variable's definition to match the added dimension—for example, to =[Month].
3. Click Edit Report, and show the Formula Toolbar. Between the first two visible columns in the main table of the report are two hidden columns: [Day] and [Is Current Data]. The figure *Hidden Columns in the Trend Report* shows the hidden [Day] column, selected within the red rectangle.
4. Select the hidden [Day] column and change its formula to your desired dimension—for example, to [Month].
5. (Optional) On the Query Panel, remove any time dimensions that you no longer want to appear in the query.
6. Save and test your report.