Genesys Interactive Insights User's Guide

Changing the Forecast

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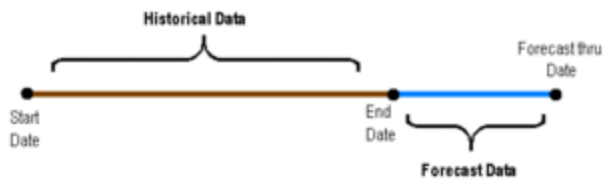
Time Ranges for the Interaction Volume Service Type
Trend Report

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 on this page, under Swapping the Forecast Measure) to load the terms for a least-squared forecast calculation. These variables are reserved for internal use; alter them only as instructed below.

Swapping the Forecast Measure

The **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 BI LaunchPad, make a copy of the Interaction Volume Service Type Trend Report and retitle it accordingly—for example, *Interaction Volume Entered Trend Report*:

    a. Select the report to copy, and choose **Organize** > **Copy**.

    b. Select the folder in which to paste the report, and choose **Organize** > **Paste**.

    c. Right click the report and choose **Properties**. Edit the Title, and click **Save & Close**.

3. Right-click a report, and in the context menu, select **Modify** to open the report for editing.

4. On the **Data Access** tab, **Data Providers** sub-tab, click **Edit Data**.
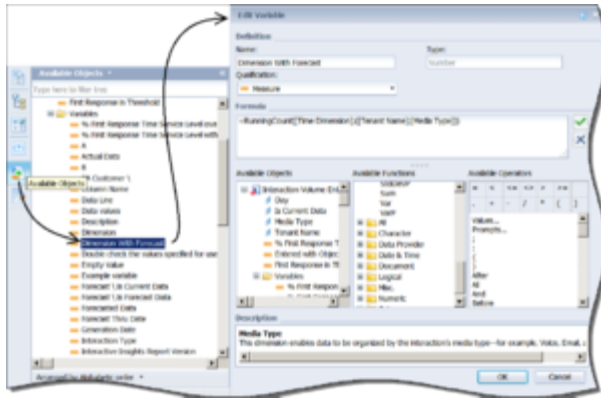
Edit Variable

5. On the **Query Panel**, add the measure you want to add to both combined queries (**Combined Query 1** [for current data] and **Combined Query 2** [for forecasted data]):

   a. Select **Combined Query 1**, then double click the measure you want to add (this adds it to the **Result Objects** field).

   b. Select **Combined Query 2**, then double click the measure you want to add (this adds it to the **Result Objects** field).

   Do not yet remove the % First Response Service Level measure.
   Close the **Query Panel**.

6. From the toolbar, click **Design** > **With Data**.

7. In the **Available Objects** list, double-click **Measure** to open the **Edit Variable** dialog box.

   The figure *Edit Variable* shows the main **Available Objects** list, and the **Edit Variable** dialog box. **Note** that the **Edit Variable** dialog box also contains a list called 'Available Objects'.

8. Create the new variable as follows:

   a. In the **Name** field, type a name for the variable.

   b. In the **Formula** field, replace [% First Response Time Service Level] with the measure that you chose in Step 1 (for example, **Entered**) and click **OK**.
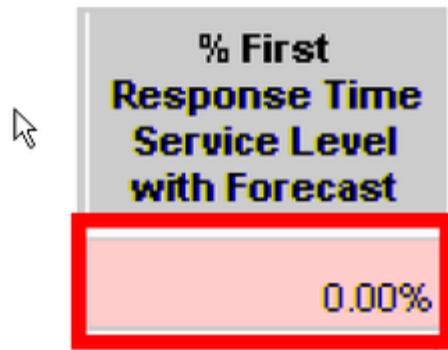
A report cell that has an alerter applied, causing the cell background color to change when an alarm is raised

Alerter

9. 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. In the **Available Objects** list, 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]

10. Appropriately rename any strings that indicate the name of the measure that is to be replaced. On the report **Summary** tab, for instance, change the name of the axis, change the chart name, and, in the report structure, change the hardcoded string % First Response Time Service Level over Time to Entered over Time.

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

12. (Optional) On the **Query Panel**, remove any measures that you no longer want to appear in the query.

13. 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 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 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:

[+] Show Steps

1. On the **Query Panel**, add the desired dimension to (or remove it from) both combined queries.

2. In the **Available Objects** list, double-click **Dimension With Forecast** to open the variable editor. Change this variable 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 **Document Structure and Filters** and modify the report section as desired.

4. Save and test your report.

Changing Time Dimensions

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

[+] Show Steps
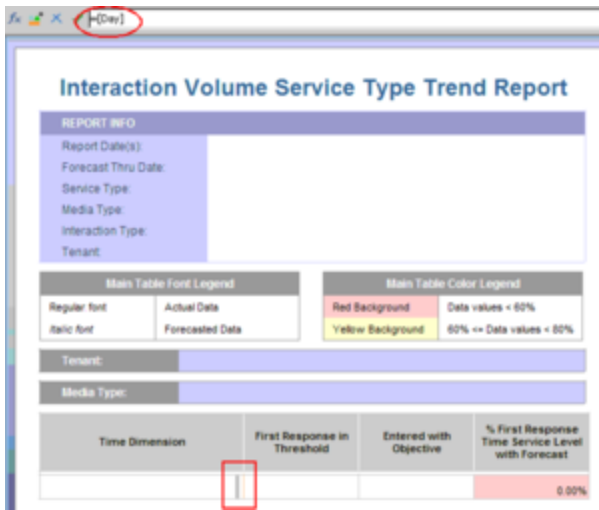
Hidden Columns in the Trend Report

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. In the **Available Objects** list, double-click **Time Dimension** to open the variable editor. Change this variable definition to match the added dimension—for example, to =[Month].

3. Click **Close** > **Apply changes and close**.
   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, highlighted 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.