Decisions User Help

Working with Scenarios

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Working with Scenarios

A scenario is an integrated staffing plan, performance plan, budget, and historical performance report for the contact center network over a period of time (weeks, months, or years). Scenarios are saved as files, and are displayed and modified using the Decisions application. You can have an unlimited number of scenario files saved, but you can only have one scenario file open at a time.

Scenarios can be edited by clicking on any editable cell in the grids (that is, cells with black text in the default color scheme), and entering new information, such as new call volumes, handle times, attrition rates, or number of new hires.

Creating a New Scenario

To create a new scenario:

1. Click **File**, and then click **New**.
2. If you are currently viewing a scenario, a dialog box will open asking if you wish to save the existing scenario before opening a new one. Click **Yes** or **No**.
3. Choose a **Start Date**, **End Date**, and **Routing Type** for the new scenario.
4. Click **OK**.

The application will create the new scenario with a temporary file name. To save the scenario, click **File**, and then click **Save** or **Save As** and enter the file name.

Opening an Existing Scenario

To open an existing scenario:

1. Click **File**, and then click **Open**.
2. If you are currently viewing a scenario, a dialog box will open asking if you want to save the existing scenario before opening a new one. Click **Yes** or **No**.
3. A dialog box will open. Choose the file name you wish to open, and click **Open**. Note that *all* scenarios file extensions are **.**cbg.
4. The file will open and the file name will be listed at the top left of the application screen, after the **Genesys Decisions** window label.

Saving a Scenario

To save a scenario file without specifying a file name:

1. Click **File**.
2. Click **Save** to save the open file under the current file name. The system will prompt you to confirm that you wish to overwrite the existing file.
3. Click **Yes** or **No**.

To save a scenario file and specify the file name:

1. Click **File**.
2. Click **Save As** to save the currently-open file under a new file name.
3. Type in the new file name, and then click **Save**.

Advancing the Start Date of a Scenario

When you advance the start date of an existing scenario, the application will convert your existing scenario to scenario history for the time period that is being eliminated. By setting the Scenario View accordingly, you can view the historical scenario data. See Displaying History for more information.

Note that changes to start dates cannot be undone.

To advance the start date of a scenario:

1. If you would like to retain a scenario with a prior start date, save your scenario under a new name.
2. If you wish to create a scenario with an earlier start date, use the **File** > **New** menu item.
3. Select the **Settings** button from the toolbar. The **Settings** box will open to the **Duration** tab.
4. Choose a new **Start Date** (which must be later than the current start date).
5. Click **OK**.

Tip

If part of a scenario month (for example, one week) has been moved to History, a month might appear simultaneously as both Actual and Scenario History in the monthly view.

Changing the End Date of a Scenario

If you reduce the length of a scenario, any data that exists for the eliminated time period will be lost. If you increase the length of a scenario, the application will add additional columns to the end of each data grid. The following metrics will transfer data to the additional columns when you roll the ending date forward:

- Agents:

    - Beginning Non-Learning Agents
    - New Hires in Classroom Training
    - Agents in Learning
    - Average Total Agents
    - Average Agent Headcount
- Staff Totals:
    - Avg Agent, Supervisor, and Clerical Staff [FTE]
- Financial Parameters:
    - All metrics in Financial Parameters

Note that changes to end dates cannot be undone. If you would like to preserve a scenario with the existing end date, be sure to save your scenario under a new name before changing the end date.

To perform a roll of the end date of a scenario:

1. Select the **Settings** button from the toolbar. The **Settings** box will open to the **Duration** tab.
2. Choose a new **End Date**, which can be either earlier or later than the current end date.
3. Click **OK**.

Adding Comments to a Column and Editing Comments

To add comments to a column:

1. Right-click the cell at the top of the column that contains the date (in either the weekly or monthly view).
2. Click **Insert Comment**. The comment text entry box displays.
3. Type the text in the comment box.
4. Click **OK**.
   The column header will display a small red triangle in the upper right corner to indicate that the column is commented.

To edit or view comments in a column:

1. Right-click the cell at the top of the column that contains the date, and then click **Edit/View Comment** to make changes.

To delete a comment:

1. Right-click the cell at the top of the column that contains the date, and then click **Delete Comment**.

Editing Settings for Email and Casework

Email/Casework Scenario Settings

To view the **Email** and/or **Casework** scenario settings in your Genesys Decisions application:

1. Select the **Settings** button at the top of the main grid, and then select the **Backoffice** tab.
    - If you create a *new* scenario, this window will be populated with the defaults created in the Administration application.
    - When you save an *existing* scenario, any updated email or casework settings will also be saved within the scenario (SL Threshold, Allow Purging, Purge Time).
2. Open the **Contact Group** drop-down menu. This menu displays all of the Contact Groups that have Email or Casework models configured in the database.
3. Open the **Media Type** drop-down menu. This is enabled when you select **Contact Group**. The menu lists all the channels (email and casework) that exist within the selected Contact Group.
4. Select **Automatically purge backlog after** to specify the length of time before purging. Values will be either in hours (integer) or days (decimal).
5. Select the **Service Level Threshold** radio button of your choice. You can make only one selection. This will determine the time frame for your service level threshold.
   The **Bucket**, **Upper Bound**, and **Time Unit** columns cannot be updated, but can be sorted.
6. Click **OK** to save any updates, or click **Cancel** if you do not want to save your changes. If you select **OK**, the Genesys Decisions application will recalculate for the selected contact group.
7. Click **Print** to print all of the information on the tab.

Main Grid Email/Casework

Backward calculations on Service Level are not supported for Email/Casework on the main grid.

Viewing Network Routing

To access routing information in your Genesys Decisions application:

1. Select the **Settings** button from the toolbar.
2. Click the **Routing** tab.

To view specific routing information, choose the routing type that you would like to view from the **Routing** drop-down box. The routing type will be displayed.

To sort the routing information in alphabetical order, click the column heading.

To print the information that displays on the **Routing** tab, click the **Print** button on the bottom left corner of the window.

> **Tip**
> Routing types can only be created and modified by your Genesys Decisions Administrator. If you need additional routing types, please contact your Genesys Decisions Administrator.

Viewing Service Quality and ET/UT Goals

To view the service quality and ET/UT goals:

1. Select the **Settings** button from the toolbar.
2. Click the **Display Goals** tab.
   The goals and targets shown in this grid control the conditional formatting in the main grid. Metric values outside of these targets will display in red text.
   - Service Level %
   - ASA (sec)
   - Abandon %
   - Max ET%
   - Max UT%
3. Click **OK**.

To print the information that displays on the **Display Goals** tab, click the **Print** button on the bottom left corner of the window.

> **Tip**
> The goals can only be modified by your Genesys Decisions System Administrator and will apply to all Decisions users. If you would like these goals to be modified, please contact your System Administrator.