Workforce Management Web for Supervisors (Classic) Help

Audit Reports

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Contents

Use the Audit reports to track the actions performed by supervisors while working in the Calendar and Master Schedule.

Related documentation:

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The Audit reports are:

- Calendar Audit Report
- Schedule Audit Report
- Configuration Audit Report

To create a report, click that report's link (above) and follow the steps.

For a complete list of all WFM reports, see the Reports List.

Restrictions

There are some restrictions when working with reports.

Security restrictions

In order to create and print these reports, permission must be assigned. See the Configuration > Roles topics for more information about security privileges.

Date restrictions

For reports whose wizard includes a **Date Range** screen:

- If you select weekly or monthly granularity, the **Start Date** and **End Date** selectors may be constrained to particular days (to the week's start and end days, or to the selected month's first and last days).
- If you enter dates that do not match these constraints and click **Next**, an error message alerts you to change your selection.

Calendar Audit Report

To configure the report:

1. On the **Reports** tab, select **Audit Reports** from the Views menu.
2. From the list in the Objects pane, select **Calendar Audit Report**.
   The Reports Wizard's first screen, Header, appears.
3. Optional: To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. Complete the **Date Range** screen:
   - Under **Action Date Range**, do one of the following:
     - Select Start and End dates for supervisor actions in the **Calendar** module.
     - Select the **Any** check box to select any date range for supervisor actions in the **Calendar** module. If checked, the Start and End date fields are disabled.
   - Under **Actions and Statuses**, check boxes to indicate the actions and statuses that you wish to audit:
     - **Insert**
     - **Edit**
     - **Delete**
     - **Preferred**
     - **Granted**
     - **Declined**
     - **Recalled**
   - Under **Calendar Items Date Range**, do one of the following:
     - Select Start and End dates for the agent calendar items you wish to audit.
     - Select the **Any** check box to select calendar items in any date range. If checked, the Start and End date fields are disabled.
   - Under **Options**, select **Show comments/memo** to comments or memo, if any, in the report.
   - Under **Sort Options**, select one of the following:
     - **By Agent name**
     - **By Supervisor name**
     - **By Timestamp date**
     - **By Calendar Item date**
6. Click **Next**.
7. On the **Data** screen, under **Available Users**, select the supervisors and other users/agents that you want to include in your report.
8. Click **Next**.
9. On the second **Data** screen, under **Available Agents**, select the agents to include in the report.
   You can expand business units to display their sites, teams, and agents. You can select

agents from multiple sites.

10. Click **Next**.
11. On the **Calendar Items** screen, select the check boxes for items that you want to include in the report, and clear the check boxes for items that you want to omit. Available selections are:
    - **Availability**
    - **Days Off**
    - **Shifts**
    - **Working Hours**
    - **Times Off**
    - **Exceptions**
12. Click **Finish**.
    The report appears in the Report Viewer.

The report is initially sorted by business unit within the enterprise, by site name within each business unit, then team name (if any) within each site. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Here's what's in the report:

Site [header]	The selected business unit, site, site time zone, and the (first) selected team.
User Name	The name of the user (supervisor) or agent responsible for the action.
Timestamp	The date and time of the supervisor action.
Action	The description of the action. Examples: Insert, Edit, and Delete.
Date	The calendar item day.
Agent	The name of the agent affected by the action.
Type	The item type name. Example: Working Hours.
Name	The calendar item name.
Status	The status assigned by the user. Examples: Granted, Declined.
Comments/Memo	This column appears if **Show Comments** was selected on the **Date Range** screen.

Schedule Audit Report

This report can show not only schedule changes made by supervisors, but also by agents. However, the schedules modified by agents cannot be filtered by the agent name or ID. Instead, all schedules modified by agents are listed as being modified by the SYSTEM user. An example would be an agent trade that is auto-approved by the system. In this case, no supervisor was involved, and that schedule change would be reported in the Schedule Audit Report as being done by the SYSTEM user.

To configure the report:

1. Complete steps 1 to 3 in Configuring the Calendar Audit Report, selecting **Schedule Audit Report** in the Objects pane.
2. Complete the **Date Range** page:
    - Under **Action Date Range**, do one of the following:
        - Select Start and End dates for supervisor actions in the Master Schedule.
        - Select the **Any** check box to select any date range for supervisor actions in the Master Schedule. If checked, the Start and End date fields are disabled.
    - Under **Actions**, check boxes to indicate the actions that you wish to audit:
        - **Publish**
        - **Cleanup**
        - **Modify**
        - **Trade**
        - **Rollback**
    - Under **Schedule Date Range**, do one of the following:
        - Select Start and End dates for the schedule days you wish to audit.
        - Select the **Any** check box to select schedule days in any date range. If checked, the Start and End date fields are disabled.
    - Under **Options**, select **Present action's details** to control whether additional detail on the action is shown on the report. See Understanding the Schedule Audit Report below for more information.
    - Under **Sort Options**, select one of the following:
        - **By Supervisor name**
        - **By Timestamp date**
        - **By Schedule date**
3. Click **Next**.
4. On the **Data** screen, under **Available Users**, select the supervisors and other users/agents that you want to include in your report.
5. Click **Next**.
6. On the second **Data** screen, under **Available Agents**, select the agents to include in the report.
   You can expand business units to display their sites, teams, and agents. You can select agents from multiple sites.
7. Click **Finish**.
   The report appears in the Report Viewer.

The report is initially sorted by business unit within the enterprise, by site name within each business unit, then team name (if any) within each site. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Here's what's in the report:

Site [header]	The selected business unit, site, and site time zone.
Date Period	The selection made by the user for **Action Date Range** on the **Date Range** page of the report generation wizard.
User Name	The name of the user (supervisor) or agent responsible for the action.
Timestamp	The date and time of the supervisor action.
Action	The description of the action. Examples: Publish, Cleanup, Modify.
Date Range	If the Action is **Publish** or **Cleanup**, this column shows the date range for the action. If the Action is **Modify**, this column shows the date of the modified schedule day.
Applied to	If the Action is **Publish**, this column shows the name of the scenario used for the published data. If the Action is **Modify**, this column shows the name of the agent associated with the schedule modification. If the Action is **Cleanup**, this column is empty. If you selected **Present action's details** on the **Data Range** screen, the following applies: If the Action is **Publish** or **Cleanup**, the report lists all affected agents.

If the schedule was changed and you checked **Present Action's Details** on the **Date Range** page, the report displays two tables at the bottom:

- Left-hand table: Original schedule
- Right-hand table: Modified schedule.

The left-hand table contains these columns:

- **Original Schedule**
- **Start Time**
- **End Time**
- **Paid Time**
- **Applied To**

The right-hand table contains these columns:

- **Modified Schedule**
- **Start Time**
- **End Time**
- **Paid Time**
- **Applied To**

Configuration Audit Report

To configure the report:

1. Complete steps 1 to 3 in Configuring the Calendar Audit Report, selecting **Configuration Audit Report** in the Objects pane.
2. Complete the **Date Range** screen:
   - Under **Action Date Range**, do one of the following:
     - Select Start and End dates for supervisor actions with configuration objects.
     - Select the **Any** check box to select any date range for supervisor actions with configuration objects. If checked, the Start and End date fields are disabled.
   - Under **Actions**, select the check boxes which indicate actions that you wish to audit:
     - **Insert**
     - **Modify**
     - **Delete**.
   - Under **Sort Options**, select one of the following from the drop-down menu:
     - **By Object's type**
     - **By Supervisor name**
     - **By Timestamp date**.
3. Click **Next**.
4. On the **Configuration Object Types** screen, under **Data Types**, select the check boxes for data types that you want to include in the report, and clear the check boxes for items that you want to omit.
5. Click **Next**.
6. On the **Data Page**, under **Available Users**, select the supervisors and other users (including agents, if shared transport groups are enabled) that you want to include in your report.
7. Click **Next**.
8. On the second **Data Page**, under **Available Sites**, select the sites to include in the report.
   You can expand business units to display their sites. You can select multiple sites.
9. Click **Finish**.
   The report appears in the Report Viewer.

The report is initially sorted by business unit within the enterprise, by site name within each business unit. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Here's what's in the report:

Header	The selected business unit, site, and date period.
User Name	The name of the user (supervisor) or agent responsible for the action.
Action	The description of the action. Examples: Insert, Edit, and Delete.

Object Type	The object that is being reported (Example: Time-Off Type)
Object Name	The reported object’s name (Example: Time Off 1)
Timestamp	The date and time of the supervisor action.
Field	Data field inside the object.
Old Value	The object's previous value (if there was one).
New Value	The object's updated value.