Workforce Management Web for Supervisors (Classic) Help

Calendar Reports

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Contents

Use the various Calendar reports to display calendar items data, such as time off, days off, shifts, rotating patterns, availability, working hours, exceptions, and preferences.

Related documentation:

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The Calendar reports are:

* Calendar Items Report
* Time-Off Report
* Time-Off Balance Report
* Time-Off Management 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

You can view and print reports only for those sites for which you have security access.

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.
* If you select intra-day granularity, the **End Date** selector is disabled.

Calendar Items Report

Configuring the report

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.

2. From the list in the **Objects** pane, select **Calendar Items 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. Optional: To export the report to a file in the comma-separated values format:

   1. Select the check box **Create report with .csv friendly format**.

   2. After the report is created, select **Actions** > **Save As**.

   3. Select **Comma Separated** as the report format. (See Tip below.)

5. Click **Next**.

6. In the **Date Range** screen, select a start and end date for the report's data.

7. Optionally, you can select **Show comments/memo** to show comments or memos, if any, in the report.

8. Click **Next**.

9. On the **Data** screen, select the agents that you want to include in your report.
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or 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:

    • **Rotating Patterns**

    • **Availability**

    • **Days Off**

    • **Shifts**

       • **Working Hours**

    • **Time Off**

    • **Exceptions**

    If you select Exceptions or Time Off on this screen, you must specify Exception and Time-Off types.

12. Click **Finish**.
    The report appears in the Report Viewer.

> ### Tip
> Do not use Workforce Management to print reports that you created in ".csv friendly format," (in step 4 of the procedure) because the result might be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.

Here's what's in the report:

Site [header]	The selected site, its time zone, and the (first) selected team. The report is organized by team.
Date Period [header]	The dates covered in the report.
Agent	The name of each agent included in the report.
Date	The date on which the agent requested an exception, rotating pattern, or preference. The report can show multiple calendar items for agents.
Type	Rotating patterns, availabilities, days off, shifts, working hours, times off, or exceptions.
Description	The name of exception or preference, or description of rotating pattern.
Start Time	The time at which the calendar item starts.
End Time	The time at which the calendar item ends.
Status	Whether the calendar item is Scheduled, Not Scheduled, Granted, Declined, Preferred, or Recalled.
Comments/Memo	Optional column.

Time-Off Report

Configuring the report

1. Complete steps 1 to 6 in Configuring the Calendar Items Report, selecting **Time-Off Balance Report** in the Objects pane.

2. From the **Sort Options** drop-down list, select to sort the report by agent name or by the date for which time off was requested.

3. Click **Next**.

4. On the **Data** screen, select the agents you want to see in the report.
   You can expand business units to display their sites and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.

5. Click **Next**.

6. On the **Available Time-Off Types** screen, select the time-off types you want to see in the report. Time-off types are grouped by business units and sites.

7. Click **Finish**.
   The report appears in the Report Viewer.

Here's what's in the report:

Site [header]	The selected site and its time zone.
Team [header]	The team to which the agents in the table below belong. If you selected more than one team, teams

	are listed in alphabetical order, with the data for agents in one team appearing before the next team name in the list.
Date Period [header]	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Date	The date for which the agent has submitted a time-off preference. The time-off balance shown in the **Balance** column is also for this date.
Description	The name of the time-off type.
Start Time and End Time	When the time-off period starts and ends. For a full-day time-off request, both columns say Full Day.
Status	Whether the time-off preference is Preferred, Granted, Declined, Recalled, Scheduled, or not Scheduled.
Date and Time Submitted	The time at which the time-off preference was made.
Balance	The agent's available time-off hours as of the date of the request.
Comments	Comments, if any, submitted with time-off item.

Time-Off Balance Report

Configuring the report

1. Complete steps 1 to 6 in Configuring the Calendar Items Report, selecting **Time-Off Report** in the Objects pane.

2. From the **Sort Options** drop-down list, select to sort the report by agent name, by the date for which time off was requested, or by the request's date submitted.

3. Optionally, you can select:

   - **Show time-off balance**.

   - **Show comments** to show comments, if any, in the report.

4. Click **Next**.

5. On the **Data** screen, select the agents you want to see in the report.
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.

6. Click **Next**.

7. On the **Available Time-Off Types** screen, select the time-off types you want to see in the report. Time-off types are grouped by business units and sites.

8. Click **Finish**.
   The report appears in the Report Viewer.

Here's what's in the report:

Site [header]	The selected site and its time zone.
Team [header]	The team to which the agents in the table below belong. If you selected more than one team, teams are listed in alphabetical order, with the data for agents in one team appearing before the next team name in the list.
Date Period [header]	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Date	The date for which the agent has submitted a time-off preference. The time-off balance shown in the **Balance** column is also for this date.
Description	The name of the time-off type.
Balance	The agent's current number of available time-off hours of the type shown in the **Description** column, as of the date shown in the **Date** column.

Time-Off Management Report

Configuring the report

1. Complete steps 1 to 6 in Configuring the Calendar Items Report, selecting **Time-Off Management Report** in the Objects pane.

2. Click **Next**.

3. On the **Data** screen, select the agents you want to see in the report.
   You can expand business units to display their sites, and expand sites to display their teams and agents. You can select any combination of teams and/or agents from multiple sites.

4. Click **Next**.

5. On the **Available Time-Off Types** screen, select the time-off types that you want to see in the report.
   Time-off types are grouped by business units and sites.

6. Click **Finish**.
   The report appears in the Report Viewer.

Here's what's in the report:

Report Header	
Site	The selected site and its time zone.
Time Zone	Time zone of the he selected site.
Team	The team to which the agent in the table below belongs.
Date Period	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Rules table columns:	This table lists data for each rule that applies to each time-off type in the report. The format is one rule per line, and one table per type/agent combination. **Time-Off Rule**, **Time-Off Type**, **Start date**, **End date**, **Carried Over**, **Carry Over Day**
Daily Status table (untitled) columns:	This table lists data for each date in the report. The format is one date per line, and one table per agent / time-off type combination. **Date**, **Balance**, **Accrued/Awarded**, **Credit**, **Carried Over**, **Used**, **Bonus Assigned**, **Bonus Used**, **Bonus Expired**, **Bonus Balance** Tip The **Used** column contains the sum of Granted + Preferred + Scheduled + Not Scheduled time-off hours which exceed bonus hours, but Not Scheduled hours are included only if you configure WFM to include them. Ask your Genesys Professional Services representative about this feature.
Instance Status table (untitled) columns:	This table lists data for each time-off instance that was either Granted, Declined, Preferred, Scheduled, or Not Scheduled.

	The format is one title per line / data line per instance.
	Time-Off Type, **Time-Off Status**, **Start Time**, **End Time**, **Paid Hours**, **Submitted On**, **Comments**