Workforce Management Web for Supervisors (Classic) Help

Individual and Team Schedule Reports

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Contents

Configure these reports to display data for each agent's schedule and each team's schedule, individually.

Related documentation:

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Individual Schedule Report

To configure the report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Individual Schedule** from the list in the Objects pane.
   The Reports Wizard's first screen, Header, appears.
3. Optional: To generate 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, select the check box **Create report with .csv friendly format** (and then, after the report is created, select **Actions** > **Save As** and select **Comma Separated** as the report format). Do not use Workforce Management to print reports that you created in ".csv friendly format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
5. Click **Next**.
6. On the **Scenario** screen, select a schedule scenario or the Master Schedule. Then click **Next**.
   You will not see this screen if the report is created from the Report Scheduler, because the report data is retrieved from the Master Schedule.
7. On the **Date Range** screen, select a Start and End date for the report. Then click **Next**.
8. On the **Data** screen, select the agent(s) for whom to generate the report.
   You can expand business units to display their sites, teams, and agents.
9. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site's name and time zone.
Team [header]	The selected agent's team.
Agent [header]	The selected agent's name.
Date Period [header]	The total date range covered by the report.
Employee ID	The agent's company ID.

Day	The date for each information set.
Paid Hours	Total number of paid hours the agent works on each displayed day.
Schedule State	The agent's schedule states on each displayed day.
Start Time	The time at which the agent is scheduled to start each scheduled state.
End Time	The time at which the agent is scheduled to end each scheduled state.

Team Schedule Report

To configure the report:

1. Complete steps 1 to 6 in Individual Schedule Report, selecting **Team Schedule Report** in the Objects pane in step 2.
2. Optionally, click the **Sort by shift start** check box. Then click **Next**.
3. In the **Date Range** Page, select a Start and End date for the report. Then click **Next**.
4. On the **Data** screen, select the team(s) for which to generate the report.
   You can expand business units to display their sites and teams.
   The report is sorted in alphabetical order by business unit, site name within each business unit, and team name.
5. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site's name and time zone.
Team [header]	The team covered by the report.
Date Period [header]	The date period covered by the report.
Day [header]	The report is organized day-by-day. This line identifies the first displayed date.
Agent	The name of each of the team's agents.
Total Hours	The agent's total hours (paid hours plus unpaid hours) for the day.
Paid Hours	The agent's paid hours for the day.
Effective Hours	The hours during which the agent is paid and working. (Activity work is included, but breaks are not.)
Schedule State	Schedule state and activity set information.
Start Time	The time at which the agent is scheduled to start each scheduled state.

End Time	The time at which the agent is scheduled to end each scheduled state.