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Workforce Management Web for Supervisors (Classic) Help

[Policies Reports](#)

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Use the Policies Reports to summarize data about policy objects.

Related documentation:

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Policies reports summarize the properties of agents, contracts, shifts, and rotating patterns.

The Policies reports are:

- Agent Properties Report.
- Contract Properties Report.
- Shift Properties Report.
- Rotating Pattern Properties 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.

Configuring the report

To configure the report:

1. On the **Reports** tab, select **Policies Reports** from the Views menu.
2. From the list in the **Objects** pane, select the report you want to configure.
The Reports Wizard's first screen, Header, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box.
4. Click **Next**.
5. On the **Data** screen, select the agents that you want to include in the report.
You can expand business units to display their sites, teams, and agents. You can select any combination of agents or teams, from multiple sites.
6. Click **Finish**.
The report appears in the Report Viewer.

Agent Properties Report

Here's what's in the report:

Site [header]	The report is organized by sites, by teams within each site, and site time zone.
Agent	Name of each agent included in the report.
ID	Agent's identification number.
Hire Date	Date that agent was hired.
Termination Date	Date that agent was terminated.
Rank	Agent's rank set in Agent properties.
Contract	The contract type assigned to agent.
Rotating Pattern	The agent's rotating pattern, if one was assigned.
Wage	The current wage set for the agent.
Skills (Level)	The skills that have been assigned to agent.
Activities	List of activities that the agent can work on.
Comments	Any comments for agent that were entered during configuration.
Time-Off Rule	Time-off rule assigned to agent.
Time-Off Types	All time-off types associated with time-off rule.
Last Carry-Over Date	Most recent date for carry-over of unused time-off hours.
Hours Carried Over	Number of time-off hours carried over from the previous year to the current one.
Stop Date	Date when the Time-Off Rule became inactive for agent.

Contract Properties Report

Here's what's in the report:

Site [header]	The selected site, its time zone, and the (first) selected contract. Each subsequent contract is displayed separately.
Contract Name	The name of the contract whose properties are displayed below.
Daily Working Hours	<p>The number of daily paid hours defined for this contract. Agents assigned to the contract must have at least this number of paid hours each day.</p> <p>This value is aggregated to the three report statistics: Min., Std., and Max. representing the minimum, standard, and maximum number of paid hours per day.</p>
Weekly Working Hours	<p>The number of weekly paid hours defined for this contract. Agents assigned to the contract must have at least this number of paid hours each week.</p> <p>This value is aggregated to the three report statistics: Min., Std., and Max. representing the minimum, standard, and maximum number of paid hours per week.</p>
Schedule Planning Period Working Hours	<p>The number of daily paid hours defined for the schedule planning period for this contract. Agents assigned to the contract must have at least this number of hours within the schedule planning period.</p> <p>This value is aggregated to the three report statistics: Min., Std., and Max. representing the minimum, standard, and maximum number of paid hours per schedule planning period.</p>
Weekly Working Days	<p>The number of weekly working days defined for this contract. Agents assigned to the contract must be available to work at least this number of days each week.</p> <p>This value is aggregated to the two report statistics: Min. and Max. representing the minimum and maximum number of working days per week.</p>
Max. Consecutive Working Days	The maximum number of consecutive working days defined for this contract. Agents assigned to the contract cannot exceed this number of consecutive working days.
Synch. Period	The period of time over which synchronization occurs.
Synch. of Daily Schedules Flexibility	The number of hours within which the daily schedule is assumed to be synchronized.
Synch. Type	The type of synchronization used for the contract, such as shifts between days off, one week or a period of weeks, or the Schedule Planning Period.

Weekdays for Synch.	The weekdays on which synchronization will occur.
Daily Availability (Start time and End time)	The Start and End times that the agent assigned to the contract is available to work each day.
Weekend First Day	The day that is assigned or designated as the first day of the weekend, such as Friday, Saturday, or Sunday.
First Weekend Days Off	<p>The number of times that the agent assigned to the contract can have the first weekend day off.</p> <p>This value is aggregated to the three report statistics: Min., Max., and Enabled representing the minimum and maximum number of first weekend days off allowed for the contract, and whether or not the restriction is enabled (Yes, No).</p>
Second Weekend Days Off	<p>The number of times that the agent assigned to the contract can have the second weekend day off.</p> <p>This value is aggregated to the three report statistics: Min., Max., and Enabled representing the minimum and maximum number of second weekend days off allowed for the contract, and whether or not the restriction is enabled (Yes, No).</p>
Both Weekend Days Off	<p>The number of times that the agent assigned to the contract can have the both weekend days off.</p> <p>This value is aggregated to the three report statistics: Min., Max., and Enabled representing the minimum and maximum number of both weekend days off allowed for the contract, and whether or not the restriction is enabled (Yes, No).</p>

Each category is an element of the Contract/Site combination that is listed in the report header.

Key

- **Min.**—Minimum
- **Std.**—Standard
- **Max.**—Maximum
- **Synch.**—Synchronization
- **Shift** table lists all shifts covered by the contract.

Shift Properties Report

Here's what's in the report:

Site [header]		The selected site, its time zone, and the (first) selected shift. Each subsequent shift is displayed separately.
Shift Name		The name of the shift whose

		properties are displayed below.
Min. Paid Hours		The minimum number of hours defined for this shift. All contracts assigned to the shift must be available to work at least this number of hours.
Max. Paid Hours		The maximum number of hours defined for this shift.
Earliest Start Time		The earliest time that this shift can start.
Latest Start Time		The latest time that this shift can start.
Earliest End Time		The earliest time that this shift can end.
Latest End Time		The latest time that this shift can end.
Days of Week		Days on which this contract can be scheduled.
Day Off Rule		Rule for scheduling this shift. (For example, one possible value is Next day is not off.)
Distrib. Period		Distribution period for this shift.
Min Distrib.		Minimum amount of time that this shift should be scheduled during the Distribution Period.
Max Distrib.		Maximum amount of time that this shift should be scheduled during the Distribution Period.
Min. Distance Between Shift Items		The shortest amount of time allowed between shift items (breaks and meals).
Max. Distance between Shift Items		The longest amount of time allowed between shift items (breaks and meals). Also applies to the distance from shift start to first shift item and from last shift item to shift end.
Task sequences usage		The usage for Task Sequences during scheduling.
Task sequences [if applicable]	Task Sequence Name	The task sequence associated with the shift.
	Index	The position of the task-sequence item in the task sequence.
	Activity Set	The activity set on which the agent can work during the specified task-sequence interval.
	Min Duration	Minimum task sequence

		duration.
	Max Duration	Maximum task sequence duration.
	Fixed Position	<p>Whether the task-sequence interval has strict bounds. Possible values are:</p> <ul style="list-style-type: none"> • Task is flexible within the earliest start, latest end interval. • Start is fixed, end is flexible. • End is fixed, start is flexible. • Start and end are fixed.
Contracts		The contracts associated with the shift.
Shift Item sequences [if applicable]	Min. Paid Hours	The minimum paid shift duration for which this break and meal sequence takes effect. (This break and meal sequence cannot be applied to shifts shorter than this duration.)
	Allowed	Specifies if this Shift Item Sequence be used while scheduling (value can be Yes or No).
	Index	The position of the shift item in the Shift Item Sequence.
	Meal	Meals that are assigned to this Shift Item Sequence.
	Break	Breaks that are assigned to this Shift Item Sequence
Break [if applicable]	Break Name	The break associated with the shift.
	Index	The position of the break in the shift's list of breaks. The same break may occur more than once.
	Duration	The length of the break.
	Min. Length From Shift Start	The minimum distance between the start of the shift and the start of the break.
	Max. Length from Shift Start	The maximum distance between the start of the shift and the start of the break.
	Min. Length from Shift End	The minimum distance between the end of the break and the end of the shift.

	Paid Time	Shows break is paid or not.
	Start Step	Shows increments between break start times. For example, with a start step of 15 minutes, agents leave for the break 15 minutes apart.
	Start Offset	Sets how many minutes past the hour in the interval in which a break may occur that the start step calculation should begin.
	Fixed Position	Shows whether the break has to occur at a specific point in the shift.
Meals [if applicable]	Meal Name	The meal associated with the shift.
	Index	The position of the meal in the shift's list of meals. The same meal may occur more than once.
	Earliest Start Time	The earliest time this meal can start.
	Latest End Time	The latest time this meal can end.
	Duration	The length of the meal.
	Min. Time Before Meal	The minimum distance between the shift's start time and the meal's start time.
	Min. Time After Meal	The minimum distance between meal's end time and the shift's end time.
	Paid	Whether the meal is paid or unpaid.
	Start Step	The meal's start times must be a multiple of this integer.

Rotating Pattern Properties Report

Here's what's in the report:

Site [header]	The selected site.
Time Zone	The time zone for the site.
Rotating Pattern	The rotating pattern displayed.
Weekly Pattern	The name of displayed weekly pattern.
Min. Paid Hours	If Use Weekly Paid Hours is selected in the Weekly Rules pane, the minimum Paid Hours for the weekly pattern.

Max. Paid Hours	If Use Weekly Paid Hours is selected in the Weekly Rules pane, the maximum paid hours for the weekly pattern.
Day of Week	The weekly schedule settings for each day of the week.
Shift	The shift assigned on each day for each weekly schedule within the rotating pattern, if applicable.
Start Time	The shift's start time on each day of the weekly schedule, if applicable.
Paid Hours/Duration	The paid hours in the shift on each day of the weekly schedule, if applicable.
Estimated End Time	The estimated end time of the shift (start time + paid hours), if applicable.
Activities	The activities performed on each day for the weekly schedule. Displays All Applicable if No Activity Limitation was selected in the Rotating Pattern Activities pane for this Rotating Pattern.
Possible Day Off	Whether it is possible for the Schedule resolution process to assign this day as a day off.