Workforce Management Web for Supervisors (Classic) Help

Performance Reports

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Use the Performance Reports to summarize site performance measures in tabular and/or graph formats.

Related documentation:

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The Performance reports are:

- Actual Overhead Report.
- Workforce Performance Report.
- Contact Center Performance Report.
- Contact Center Performance Graphs Report.

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

For a complete list of all WFM, 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.

Actual Overhead Report

To configure the report:

1. On the **Reports** tab, select **Performance Reports** from the Views menu.
2. From the list in the **Objects** pane, select **Actual Overhead Report**.
   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:
   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. On the **Date Range** screen, select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
7. If you want to display staffing totals in Full Time Equivalent (FTE) or man-hours mode, select the mode by checking or unchecking **Show staffing totals information in man hours instead of FTE**. The default value of this option will be the same as the settings in Changing the staffing display from FTE to man hours.
8. Click **Next**.
9. On the **Data** screen, select the sites that you want to include in the report's data.
   You can expand business units to display their sites. You can make multiple selections.
10. Click **Finish**.
    The report appears in the Report Viewer.

> ### Tip
> Do not use Workforce Management (WFM) 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.

Here's what's in the report:

Site or Business Unit [header]	The name and time zone of the site or business unit.
Date [header]	The dates that you selected in the Reports Wizard.
Timestep/Day/Week of/Month/X Weeks	The time periods shown in this column correspond to the granularity that you selected in the wizard.
Forecast	
Calculated Staffing	Calculated Staffing taken from Master Forecast on selected time period.
% Planned	Forecasted Total Planned Overhead for selected site on selected period.
% Unplanned Overhead	Forecasted Total Unplanned Overhead for selected site on selected period.

Schedule	
Coverage	The scheduled staffing coverage for an activity or multi-site activity.
% Planned Overhead	The percentage of time that the agent is scheduled for Schedule State Groups defined as Planned Overhead.
% Unplanned Overhead	The percentage of time that the agent is scheduled for Schedule State Groups defined as Unplanned Overhead.
Total/Average [footer]	The total or average for each statistic, over the report's displayed period. Displayed in Full-Time Equivalents (FTEs).

Workforce Performance Report

To configure the report:

1. Complete steps 1 to 5 in Configuring the Actual Overhead Report selecting **Workforce Performance Report** in the Objects pane.
2. On the **Date Range** screen:
    1. Select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.)
    2. Enter a **Percentage of Deviation Threshold**. (Periods whose actual values differ from the planned values by more than this percentage are listed as noncompliant.)
    3. Select a time zone.
    4. Select **Activity**, **Site**, **Activity Group**, **Multi-site Activity**, or **Business Unit** from the drop-down list.
    5. Click **Next**.
3. On the **Data** screen, select the targets that you want to include in the report's data.
   The tree on this page displays activities, sites, activity groups, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.
4. Click **Finish**.
   The report appears in the Report Viewer.

Here's what's in the report:

Root/Site [header]	The name and time zone of the target or site.
Target/Activity or Site [header]	The report is organized by activity, site, business unit, or multi-site activity, depending on the target that you selected in the Reports Wizard.
Date/Date Period	The date or date period selected in the wizard.
Timestep / Day / Week of / Month / X Weeks of	Time periods, corresponding to the granularity that

	you selected in the wizard.
Actual	The actual staffing for each timestep.
Calculated	The calculated staffing for each timestep. The report shows the calculated value, the difference between calculated and actual values (that is, calculated minus actual), and the difference expressed as a percentage.
Required	The required staffing for each timestep. The report shows the required value, the difference between required and actual values (that is, required minus actual), and the difference expressed as a percentage.
Headcount	The scheduled staffing for each timestep. The report shows the scheduled value, the difference between scheduled and actual values (that is, scheduled minus actual), and the difference expressed as a percentage.
Deviation [footer]	The number of compliant periods. To be compliant, a period's actual values must differ from planned values by less than the **Percentage of Deviation Threshold** that you set in the wizard.
Deviation %	The percentage of compliant periods.

Contact Center Performance Report

To configure the report:

1. Complete steps 1 to 5 in Configuring the Actual Overhead Report selecting **Contact Center Performance Report** in the Objects pane.
2. On the **Date Range** screen:
    1. Select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.)
    2. Select a time zone.
    3. Select the Target type (activity, activity group, multi-site activity, site, business unit) for which you want the report generated. If you select multi-site activity or business unit, the following check box appears: **Use Multi-site Activities**. Leave checked to aggregate report data by multi-site activities.
    4. Click **Next**.
3. On the **Data** screen, select the targets that you want to include in the report's data.
The tree on this page displays activities, sites, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, you can expand the tree's business units to display their contents. You can make multiple selections.
4. Click **Next**.
5. On the **Performance Data Types** screen, select the data types (statistics) that you want to include.

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

Here's what's in the report:

Root/Site [header]	The name and time zone of the target or site.
Target/Activity or Site [header]	The report is organized by activity, site, business unit, or multi-site activity, depending on the target that you selected in the Reports Wizard.
Date or Date Period	The date or date period that you selected in the wizard.
Timestep / Day / Week of / Month / *X* Weeks of	The time periods shown in this column correspond to the granularity that you selected in the wizard.
Coverage	The scheduled and optimal coverage per period, the scheduled coverage minus the optimal coverage, the difference as an absolute value, and the difference as a percentage. See also **Variance**, where the calculation for optimal staffing (another name for optimal coverage) is described.
Headcount	The scheduled and actual agents per period, the scheduled number minus the actual number, and the difference as a percentage.
Interaction Volumes	The forecast and actual interaction volume per period, the forecast minus the actual, and the difference as a percentage.
AHT	The forecast and actual average handling time per period, the forecast minus the actual, and the difference as a percentage.
Service Level	The scheduled and actual service level per period.
Deferred Service Level	The deferred scheduled and actual service level per period.
Queue	The scheduled and actual number of interactions in the backlog queue at the end of the period.
ASA	The scheduled and actual average speed of answer for each period.
Abandoned (%)	The percentage of scheduled and actual abandons per period.
Total/Average [footer]	The value for Interaction volume is calculated as the sum of values in each timestep. The value for all other Data Types is calculated as the average of values in each timestep.

Contact Center Performance Graphs Report

To configure the report:

1. Complete steps 1 to 3 in Configuring the Actual Overhead Report, selecting **Contact Center Performance Graph Report** in the Objects pane.
2. Click **Next**.
3. On the **Date Range** screen
    1. Select a Granularity and a corresponding Start Date and End Date. (Your Granularity selection may restrict your Date selections.)
    2. Select a time zone.
    3. Click **Next**.
4. On the **Data** screen, select the activities that you want to include in the report's data.
   You can expand business units to display their sites, and expand sites to display their activities. You can select any combination of activities from multiple sites.
5. Click **Next**.
6. On the **Performance Data Types** screen, select the data types (statistics) that you want to include.
7. Click **Finish**.
   The report appears in the Report Viewer.

> **Tip**
>
> In addition to actual and scheduled data, the Contact Center Performance Report and Contact Center Performance Graph Report now include forecast-related data. You can select the granularity (**15**, **30** or **60**) and select **Calculated** or **Required** forecast values.

Here's what's in the report:

Site [header]	The site's name and time zone.
Activity [header]	The report is organized by activity.
Date or Date Period [header]	The date or date period that you selected in the Reports Wizard.
Planned/Actual [legend]	Indicates how the report displays forecasted and actual data.
Graph Type	The graph's vertical axis identifies the displayed statistic (Interaction Volumes, Average Handling Time, or Number of Agents), and labels its units.
Timestep / Day / Week of / Month / *X* Weeks of	The graph's horizontal axis labels the time period covered by each of the graph's bars. The periods depend on the granularity that you selected in the wizard.