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Workforce Management Web for Supervisors (Classic) Help

[Reports](#)

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View and generate a variety of WFM reports.

Related documentation:

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Use the Reports views to generate a variety of Configuration, Policies, Calendar, Forecast, Schedule, Performance, Adherence, and Audit detailed reports, based on WFM data. Once generated, the reports appear in the Report Viewer.

See the Reports List for details about the reports available.

Report Viewer features

With the Report Viewer, you can:

- View all information contained in the report.
- Print the report. You can create many reports in CSV (comma-separated values) format, which is easily opened with spreadsheet software.
- Export the report to a local file.
- Regenerate the report, using the same or modified settings.
- Review an already generated report.

Viewing reports

To view all pages of a multi-page report, use the following navigation buttons on the Reports Viewer's toolbar (these look like the physical buttons on video or Compact Disk players):

- To move one page forward or back, click > or **(respectively)**.
- To jump to the final page or back to the first page, click >| or

Printing reports

To print a copy of a report, click the Printer icon on the Report Viewer toolbar.

Tip

Do not use WFM to print reports that you create in ".csv friendly format," because the result may be truncated. To print such a file correctly, open it in a program that reads the .csv format, and then print it.

Exporting and saving reports to local files

1. Click the **Save As** button on the **Actions** toolbar.
A dialog box appears.
2. Select a report format from the **Report Format** drop-down list.
3. Click **OK** or **Apply**.
4. If a **File Download** dialog box appears, click **Save** or **OK**.
This confirms that you want to save (not open) the file and displays a final dialog box.
5. Adjust the report's destination folder and file name.
6. Click **Save** or **OK**.

Using reports as templates

You can define and generate a new report based on the current report's settings (including all of your selections in the Reports Wizard).

1. Click the **Use as Template** button on the **Actions** toolbar.
The current report's first wizard screen appears. Each screen retains the last selections you made.
2. Proceed through the wizard screens, changing your selections as necessary on each screen.
3. Click **Finish** on the last screen.
The Report Viewer displays the new report.

Reviewing reports

Once a report has been generated, you can reopen and review it without regenerating it:

1. In the **Objects** pane, click the report name or expand its expand/collapse control.
Any generated copies of this report appear in the tree, labeled by the date and time they were generated.
2. Double-click a generated report to review it.
The report opens in the Report Viewer.

Copies of generated reports remain in the Objects tree until you either close them or exit WFM Web.

Viewing generated reports

Select **Generated Reports** in the module area to display a grid that lists scheduled reports that have already been generated. Select a report in the list and use these controls to manage it:

Delete button—Remove the selected report. You must be the creator of the scheduled report task or have the right to access all scheduled report tasks.

Show All button—This is a toggle. Select it to display all reports generated that have been created by all users (the icon becomes darkened). Clear it to display only reports that have been generated by the current user.

Save As button—Download the selected report in the format that it was saved after generation. A standard **Save File** dialog appears.

The grid has the following columns: **Name**, **Report type**, **User**, **Time** (date and time), and **Status** (information about a report's generation).

To specify a network path to store generated reports, some configuration is required. Ask your Genesys Professional Services representative for assistance with setting this up.

Closing reports

To close a displayed report:

- Click the **Close** button () on the **Actions** toolbar.

This clears the working pane and removes this report (whether standard or generated) from the Objects tree. However, your last Reports branch remains selected in the Modules tree.