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Workforce Management Web for Supervisors (Classic) Help

[Schedule State Reports](#)

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Configure these reports to display the Schedule states data from schedule scenarios or Master Schedules for teams or agents.

Related documentation:

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Schedule States Report

To configure the report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule States** 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 **Scenarios** screen, select a schedule scenario or the Master Schedule and 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 Start and End Dates and Times for the report.
8. Optional: Check the **Show filter on the first page of the report only** check box, then click **Next**.

Tip

You can select fewer weeks than are defined in the scenario that you selected in step 6.

9. On the first **Data** screen, select teams and/or agents.
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 second **Data** screen, select schedule state groups and states.
You can expand business units to display their sites, and expand sites to display their schedule state groups and schedule states. You can select multiple schedule states across different sites.

Important

Schedule states that do not belong to any schedule state group are missing from this display, but you can include them in the report by selecting the site that contains them.

12. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site name and time zone.
Selected Schedule State Groups and Schedule States [header]	A comma-separated list of the schedule state groups and schedule states that were selected in the wizard, and are applicable to the selected site.
Team [header]	Agents are displayed by team.
Date and Time Period [header]	The dates covered by the report, and time period covered each day.
Employee ID	The agent's company ID.
Agent	The agent whose information is displayed.
Date	The date on which the schedule state's shift begins.
Schedule State	The name of the schedule state.
Start Time	The schedule state start time.
End Time	The schedule state end time.
Duration	The duration of each schedule state.
Paid Hours	The paid hours for each schedule state.
Total Duration/Paid Hours for Agent <i>(not labeled)</i>	This total appears beneath the statistics for each agent. Duration: The total duration of all the agent's schedule states during the time range covered by the report. Paid Hours: The total paid hours for all the agent's schedule states during the time range covered by the report.
Total Duration/Paid Hours for Team	This total appears at the end of the report. Duration: The total duration of all selected agents on each selected team. Paid Hours: The total paid hours of all selected agents on each selected team.
Total Duration/Paid Hours for Site	This total appears at the end of the report. Duration: The total duration of all selected agents from all selected teams on the site. Paid Hours: The total paid hours of all selected agents from all selected teams on the site.

Tip

The duration of full-day time off and full-day exceptions in the report are computed according to these rules:

- The duration of paid, full-day time-off items and exceptions are equal to Paid Time.
- The duration of unpaid, full-day time-off items and exceptions are equal to Standard Daily Paid Hours from the agent's contract.

If the **Start Time** and **End Time** values are specified for time-off items and exceptions, the duration is estimated as the difference between those values.

In Genesys Administrator, if the **Reports > TotalsInStatesReport** property is set to true WFM uses the daily totals for calculations.

Schedule State Totals Report

To configure the report:

1. Complete steps 1-6 in Schedule States Report, selecting **Schedule State Totals Report** in the Objects pane in step 2.
2. On the **Date Range** screen, select a Granularity and a corresponding Start and End Date. (Your Granularity selection may restrict your Date selections.) Then click **Next**.
3. On the **Target** screen, select **Agent**, **Team**, or **Site** from the drop-down list. Then click **Next**.
4. On the **Options** screen, check the **Exclude Date Without State** and **Show filter on the first page of the report only** check boxes, if required, then click **Next**.
5. On the first **Data** screen, select the targets (agents, teams, or sites) to include in the report. You can expand business units to display their sites. If you selected **Team** or **Agent** in the **Target** Page, you can further expand the tree's branches. You can select across multiple sites.
6. Click **Next**.
7. On the second **Data** screen, select the schedule states to include.
8. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

The report takes one of two forms, depending on the target that you selected.

The Site Schedule State Totals Report

Enterprise [header]	The enterprise covered by the report.
Business Unit [header]	The name of each business unit included in the report.

Date Period [header]	The time range covered by the report.
Selected Schedule State Groups and Schedule States [header]	The schedule state groups and schedule states covered by the report.
Site	The name of each site included in the report.
Total Duration for Business Unit	The combined time that all the business unit's agents spent in the selected schedule states, over the report date range.

The Team Schedule State Totals Report

Business Unit [header]	The name of each business unit included in the report.
Site [header]	The name and time zone of the site.
Date Period [header]	The time range covered by the report.
Selected Schedule State Groups and Schedule States [header]	The schedule state groups and schedule states covered by the report.
Team	The name of each team included in the report.
Day	Each matching date in the selected date range.
Duration	The time each agent spent in the selected schedule states, for each day included in the report.
Total Duration [per Agent]	The total time each agent spent in the selected schedule states, over the report's date range.
Total Duration for Site	The combined time that all the site's agents spent in the selected schedule states, over the report's date range.
Total Duration for Team	The combined time that all the team's agents spent in the selected schedule states, over the report's date range.

Tip

The duration of full-day time off and full-day exceptions in the report are computed according to these rules:

- If the start and end are specified or estimated by WFM Server, then the duration is the difference between the end and start values.
- If the start and end are *not* specified or estimated:
 - The duration of paid full-day time off and exceptions are equal to paid time.
 - The duration of unpaid full-day time off and exceptions are equal to **Standard Daily Paid Hours** from the agent's contract.