GENESYS

Workforce Management Web for Supervisors (Classic) Help

Scheduled Budget and Agent Comments Reports

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Contents

Configure these reports to display data related to agents daily pay and agent comments in the schedule.

Related documentation:

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The Schedule Budget Report displays data related to agents daily pay, showing totals for agents and their teams.

The Agent Comments Report displays agent comments in the schedule within a specified date range.

Scheduled Budget Report

To configure the report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.

2. Select **Scheduled Budget Report** 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 file format," because the result may be truncated. To print the file correctly, open it in a program that reads the .csv file 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. Then click **Next**.

8. 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.

9. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site's name.
Team [header]	The report is organized team-by-team.
Date Period [header]	The total time period covered by the report.
Day [headers]	For each team, the report displays budget information day-by-day.
Agent	The name of each agent on the team.
Regular Budget	The agent's pay for regular work hours on the given day, based on the agent's hourly wage.
Overtime Budget	The agent's pay for overtime work hours on the given day, based on the agent's hourly wage.
Total Budget	The agent's total pay for the given day.
Number of Agents	Number of agents on the team.
Total Per Day [row]	The entire team's total regular, overtime, and total budgets for the given day.
Total for Team [row]	The team's total regular, overtime, and total budgets for the whole selected date range.

Agent Comments Report

> **Tip**
>
> This report presents information only for agents and days that have comments entered. The report is not generated if there are no agent comments in the schedule on the specified dates.

To configure the report:

1. Complete steps 1 to 6 in Schedule Budget Report, selecting **Agent Comments Report** in the Objects pane.

2. On the **Date Range** screen, select the start and end dates. Then click **Next**.

3. 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 multiple agents across teams and sites. You can also select whole teams or sites.

4. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The name of the site.
Team [header]	Agent information is displayed team-by-team.
Date Period [header]	The total date range covered by the report.
Day [header]	The date to which each group of comments applies.
Agent	The name of each agent.
Comments	Any comments about the agent entered in the **Daily Schedule** window.