Workforce Management Web for Supervisors (Classic) Help

Schedule Trade and Bidding Reports

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Contents

Configure these reports to display schedule trade and schedule bidding data.

Related documentation:

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The Schedule Trade Report contains data related to trade proposals and responses within sites.

The Schedule Bidding Report contains data about agents who have bid in schedule bidding offers.

Schedule Trade Report

To configure the report:

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

2. Select **Schedule Trade 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 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 **Date Range** screen, select a Start and End Date.

7. In the **Data Type** section, select each trade status that you want to include in the report. Clear the check boxes for each status that you want to omit. Then click **Next**.

8. In the **Sort Options** screen, select one of two ways to sort the report data, **by Agent name** or **by Date**.

9. On the **Data** screen, select the agents that you want to include in the report. You can expand business units expand to display their sites, teams, and agents. You can select multiple agents across teams. You can also select whole teams or a whole site.

10. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site's name and time zone.

Date Period [header]	The date range that you selected in the Reports Wizard.
Proposer: Team, Name	The team and name of the agent proposing each trade.
Respondent: Team, Name	The team and name of the agent responding to each trade proposal.
Trade: Days	The dates included in each trade proposal.
Status	The status of each trade proposal. (If you cleared a status on the Reports Wizard's **Schedule Trade States** screen, trades with that status do not appear in the report.)
Transaction Date	The date on which the trade proposal entered its current status.
Approved By / Declined By	The supervisor who approved or declined the trade proposal, or "Auto-Approved" / "Auto-Declined" if it was done by the system.
Comments	Any comments attached by the supervisor who acted on the trade proposal.

Schedule Bidding Report

Important

- You can generate this report only if you have the Schedule Bidding Report security right (which is granted by default). See the Configuration > Roles topics for more information about security privileges.

- The scenario that will provide data for the report must have real agents assigned to all profiles.

- The report displays only bidding candidates, not all Agents and Teams.

To configure the report:

1. Complete steps 1 to 5 in Schedule Trade Report, selecting **Schedule Bidding Report** in the Objects pane.

2. On the **Scenarios** page, select the appropriate schedule scenario and click **Next**.

3. On the **Data** page, select the appropriate Agents or Teams and click **Next**.

4. On the **Date Range** page, select one of three Data Types To Show:

    - **Shift Start/End Time**

    - **Total Paid Hours**

    - **Shift or Schedule State Names**

Select one of two **Sort Options**: **By Agent Name** or **by Agent's Position**.

5. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site name and time zone.
Date Range [header]	The dates covered by the report, and time period covered each day.
Ranking System [header]	The type of ranking system used to auto-assign the shifts.
Agent	The agent whose information is displayed.
Team	The name of the Agent's team.
Position	The agent's position in the site, based on the selected ranking system. The ranking system can be an agent's rank or seniority or combination of rank and seniority. The higher ranked or more senior (by hiring date) agents get the top positions. The position is always calculated based on all available site agents and is not dependent on the pool of agents in the particular bidding process.
Week	The week that is being documented in the same row.
Bid	Agent's original bid number for assigned schedule. Unwanted bids appear in brackets [2]. No value is display if the agent did not bid.
Days of the Week	Each column (**Sun**, **Mon**, **Tue**, **Wed**, **Thu**, **Fri**, **Sat**) displays data of the type specified in **Data Type To Show**.
Paid Hours	The Total of paid hours for the week.