Workforce Management Web for Supervisors (Classic) Help

Weekly Schedule Reports

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Contents

Configure these reports to display the weekly schedule data for agents, activity staffing, teams , and coverage.

Related documentation:

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There are four weekly schedule reports:

- Weekly Schedule Report—Contains the agents' weekly schedule data for data types you specify.
- Activity Weekly Schedule Report—Contains the activity staffing data for one week or more weeks in man hours or full-time equivalents.
- Team Weekly Schedule Report—Contains the weekly team schedule data, such as the paid, effective, and non-effective hours for each activity and agent on the team.
- Weekly Schedule Coverage Report—Contains the required and calculated staffing data for selected objects.

Weekly Schedule Report

> **Important**
> You can view this report only if you have the Weekly Schedule Report security permission. See the Configuration > Roles topics for more information about security privileges.

To configure the report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Weekly Schedule 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 **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 **Data** screen, select the elements to include in the report. This screen's tree displays a hierarchical tree of business units, sites, teams and agents. You can expand each of the tree's elements to display its contents. You can make multiple selections.
8. On the **Date Range** screen, select a date range by one of two methods:
   - Select a Start and End Date.

     > **Tip**
     >
     > If you selected the Master Schedule in step 6, you can select any number of weeks. If you selected a different schedule, you can select any number of weeks, up to the total number of weeks which are defined in that scenario.

   - Select the check box **Planning Period** (not checked by default) to specify a planning period or week range.
9. Also on the **Date Range** screen, select a data type from the radio button group **Data Type To Show** to specify what will appear in the report. The possible values are: **Shift Start/End times**, **Total Paid Hours**, and **Shift or Schedule State Names**.
10. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The name and time zone of the business unit or site.
Team [header]	Agents are displayed by team.
Date Period [header]	The total date range covered by the report.
Planning Period [header]	The total planning period covered by the report.
Employee ID	The agent's company ID.
Agent	The agent's name.
Weekdays	Columns for each day of the week.
Paid Hours	The agent's paid work hours per week.
Effective Hours	The agent's effective work hours per week.
Non-Effective Hours	The agent's noneffective work hours per week (that is, hours during which the agent is paid but not working, such as during paid breaks and paid days off).
Planning Period Paid Hours	The agent's paid work hours per planning period.
Totals for Paid Hours [row]	Total of the **Paid Hours** column.
Totals for Effective Hours [row]	Total of the **Effective Hours** column.

Totals for Non-Effective Hours [row]	Total of the **Non-effective Hours** column.
Totals hours for each week day [row]	Total of the **Weekdays** columns.

Report presentation

The information in the finished report is grouped under the following headings:

- Enterprise
- Business Unit Name
- Site Name
- Team Name
- Agent Name

Activity Weekly Schedule Report

To configure the report:

1. Complete steps 1 to 6 in Weekly Schedule Report, selecting **Activity Weekly Schedule Report** in the Objects pane.
2. Fill in the **Date Range** screen.
   a. Select a Start and End Date for the report.

      You can select multiple weeks for the report output, but your selection must be full weeks.

   b. Select **Show Required Staffing**, if required.
   c. In the **Data Type to Show** screen, select the **Start/End times**, **Total Paid Hours**, or **Shift or Schedule State Names** option, as required.
   d. Click **Next**.
3. Display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the staffing display from FTE to man hours.
4. On the **Data** screen, select the activity or activities for which to generate the report.

   You can expand business units to display their sites and activities.

5. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The site's name and time zone.
Activity [header]	The activity that is covered by the report.

Date Period [header]	The date range that you selected in the Reports Wizard.
Scheduled FTEs	The number of agents (full-time equivalents) scheduled for the activity on the selected days.
Calculated FTEs	The number of agents (full-time equivalents) in the calculated staffing for the activity.
Difference	The difference between calculated and scheduled FTEs.
Required FTEs	The number of agents (full-time equivalents) in the required staffing for the activity. This row and the next appear if you selected the **Show Required Staffing** check box.
Difference	The difference between required and scheduled FTEs.
Agent	The agent's name.
ID	The agent's identification number.
Days	Multiple columns display the agent’s start/end times (or paid hours, if **Paid Hours** check box was selected) for each weekday of the report period.
Weekly Work Hours–Paid	The agent's paid work hours per week.
Weekly Work Hours–Eff.	The agent's effective work hours per week.
Weekly Work Hours–NonEff.	The agent's noneffective work hours per week (that is, hours during which the agent is paid but not working, such as during paid breaks and paid days off).
Total Hours	The total number of paid-hours spent by all agents scheduled to work under the activity during the day. This row includes a total for each day, and a weekly total for each paid-hours category.
Total Paid Hours	The team's paid work hours per week.
Total Effective Hours	The team's effective work hours per week.
Total Non-Effective Hours	The team's noneffective work hours per week.
Total Hours for each week day	The team's paid work hours, for each day, per week.
Footnote	Indicates that the agent worked on a different activity during the specified time.

Report presentation

The information in the finished report is grouped under the following headings:

- Enterprise
- Business Unit
- Site
- Week date range

- Team
- Activity
- Agent

Team Weekly Schedule Report

To configure the report:

1. Complete steps 1 to 6 in Weekly Schedule Report, selecting **Team Weekly Schedule Report** in the Objects pane.
2. Fill in the **Date Range** screen:
    a. Select a Start and End date for the report. You can select multiple weeks for the report output, but your selection must be full weeks.
    b. In the **Data Type to Show** screen, select a data type: **Start/End Time**, **Paid Hours**, or **Shift or Schedule State Names**, as required.
    c. Click **Next**.
3. 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.
4. Click **Finish**.

The report appears in the Report Viewer. It is sorted in alphabetical order by business unit, site name within each business unit, and team name.

Understanding the report

Site [header]	The site's name and time zone.
Team [header]	The team covered by the report.
Date Period [header]	The date range that you selected in the Reports Wizard.
Activity	Each activity performed by agents on the selected team. The report is organized by activity name.
Agent	Each agent scheduled to work on the indicated activity.
ID	Each agent's identification number.
Day	Each day of the week.
Weekly Work Hours–Paid	The number of paid hours per week for each agent.
Weekly Work Hours–Eff.	The number of effective hours per week for each agent. (Excludes paid breaks and paid days off.)
Weekly Work Hours–NonEff.	The number of noneffective hours per week for each agent. (Paid non-working hours, such as paid breaks and paid days off.)
Total Hours	The total number of paid hours worked by the

	entire team if it had agents scheduled to work at the activity during the day (for the daily total) and the week (for the weekly total).
Footnote	Indicates that the agent worked on a different activity during the specified time. The footnote appears in a format similar to this: **() - Agent Works on the other Activity**, indicating that the "different" activity these agents are working on is enclosed in brackets in the report.

Report presentation

The information in the finished report is grouped under the following headings:

- Enterprise
- Business Unit
- Site
- Week date range
- Team
- Activity
- Agent

Weekly Schedule Coverage Report

To configure the report:

1. Complete steps 1 to 6 in Weekly Schedule Report, selecting **Weekly Schedule Coverage Report** in the Objects pane.
2. On the **Date Range** screen:
   a. Select a Start Date and an End Date in the **Data Range** pane.
   b. Select **Show Required Staffing** or **Calculated Staffing** in the **Options** pane.
   c. Select one: **Activity**, **Site**, **Multi-site Activity**, or **Business Unit** from the drop-down list in the **Target** pane.
   d. Click **Next**.
3. Display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the staffing display from FTE to man hours.
4. On the **Data** screen, select the targets to include in the report.

   This page's tree displays activities, sites, multi-site activities, or business units (depending on your selection on the Target screen). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.
5. Click **Finish**.

The report appears in the Report Viewer.

Understanding the report

Site [header]	The name and time zone of the business unit or site.
Activity or Site [header]	The name of the activity or site whose information appears in the table.
Date Period [header]	The total date range covered by the report.
Timestep	The data is displayed timestep-by-timestep.
Days	Columns for each day of the week.
Calculated/Required	The calculated or required staffing per timestep. (These columns appear if you selected **Show Required Staffing** and/or **Calculated Staffing** in the Reports Wizard.)
Scheduled	The effective number of agents that are scheduled for this activity for this timestep.
Difference	The difference between the calculated/required and scheduled staffing.
Total Hours [row]	The total full-time-equivalent person-hours for each day.

Tip

When the forecast for an Activity is absent, the default value for paid hours per day (a parameter used for FTE calculations) is 1 hour.