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Workforce Management Web for Supervisors Help

Reports

Contents

- [1 Reports](#)
 - [1.1 Report Viewer Features](#)
 - [1.2 Viewing Reports](#)
 - [1.3 Printing Reports](#)
 - [1.4 Exporting Reports to Local Files](#)
 - [1.5 Using Reports as Templates](#)
 - [1.6 Reviewing Reports](#)
 - [1.7 Closing Reports](#)

Reports

Use WFM Web's Reports features to generate a variety of Configuration, Policies, Calendar, Forecast, Schedule, Performance, Adherence, and Audit reports. (See the [Reports List](#) for details about the reports available.) Once generated, the reports appear in the Report Viewer.

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 **|<** (respectively).
- To jump to a particular page, type the page number into the first text box between the **>** and **<** buttons and then press **Enter**.

To zoom to a different magnification:

- Use the drop-down list to select a different %, **Page Width**, or **Whole Page**.

Report Viewer displays reports based on the selections that you made in the Reports Wizard. To change these settings, see [Using Reports as Templates](#).

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 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.

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.