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Workforce Management Web for Supervisors Help

Time-Off Management Report

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Time-Off Management Report

For the agents and dates that you select, this report displays granted, preferred, declined, and scheduled time off. It includes time-off balances for all the time-off types selected.

To create a Time-Off Management Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Time-Off Management 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. Click **Next**.
5. In the **Date Range** screen, select a start and end date for the report's data.
6. Click **Next**.
7. On the **Data** screen, select the agents you want to see in the report.

Tip

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.

8. Click **Next**.
9. On the **Available Time-Off Types** screen, select the time-off types that you want to see in the report. Time-off types are grouped by business units and sites.
10. Click **Finish**. The report appears in the **Report Viewer**.

Understanding the Time-Off Management Report

Report Header	
Site	The selected site and its time zone.
Time Zone	Time zone of the he selected site.
Team	The team to which the agent in the table below belongs.
Date Period	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Rules table columns:	This table lists data for each rule that applies to

	<p>each time-off type in the report. The format is one rule per line, and one table per type/agent combination.</p> <p>Time-Off Rule, Time-Off Type, Start date, End date, Carried Over, Carry Over Day</p>
<p>Daily Status table (untitled) columns:</p>	<p>This table lists data for each date in the report. The format is one date per line, and one table per agent / time-off type combination.</p> <p>Date, Balance, Accrued/Awarded, Credit, Carried Over, Used, Bonus Assigned, Bonus Used, Bonus Expired, Bonus Balance</p> <div> <p>Tip</p> <p>The Used column contains the sum of Granted + Preferred + Scheduled + Not Scheduled time-off hours which exceed bonus hours, but Not Scheduled hours are included only if the option CalendarOverScheduleData is enabled.</p> </div>
<p>Instance Status table (untitled) columns:</p>	<p>This table lists data for each time-off instance that was either Granted, Declined, Preferred, Scheduled, or Not Scheduled.</p> <p>The format is one title per line / data line per instance.</p> <p>Time-Off Type, Time-Off Status, Start Time, End Time, Paid Hours, Submitted On, Comments</p>