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Workforce Management Web for Supervisors Help

Calendar Items Report

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Calendar Items Report

To create a Calendar Items Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Calendar Items 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.
   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 might be truncated. To print the file correctly, open it in a program that reads the .csv format, and then print it.
4. Click **Next**.
5. In the **Date Range** screen, select a start and end date for the report's data.
6. Optionally, you can select **Show comments/memo** to control whether comments or memos, if any, are shown on the report.
   Click **Next**.
7. On the **Data** screen, from the **Available Agents** list, select the agents that you want to include in your report.
   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.
   Click **Next**.
8. On the **Calendar Items** screen, select the check boxes for items that you want to include in the report, and clear the check boxes for items that you want to omit. Available selections are:
   - **Rotating Patterns**
   - **Availabilities**
   - **Days Off**
   - **Shifts**
   - **Working Hours**
   - **Times Off**
   - **Exceptions**
9. Click **Finish**.

> **Important**
>
> If **Exceptions** and **Times Off** are selected on the **Calendar Items** page, you must specify Exceptions and Time-Off types.

The report appears in the Report Viewer.

Understanding the Calendar Items Report

Site [header]	The selected site, its time zone, and the (first) selected team. The report is organized by team.
Date Period [header]	The dates covered in the report.
Agent	The name of each agent included in the report.
Date	The date on which the agent requested an exception, rotating pattern, or preference. The report can show multiple calendar items for agents.
Type	Rotating patterns, availabilities, days off, shifts, working hours, times off, or exceptions.
Description	The name of exception or preference, or description of rotating pattern.
Start Time	The time at which the calendar item starts.
End Time	The time at which the calendar item ends.
Status	Whether the calendar item is Scheduled, Not Scheduled, Granted, Declined, Preferred, or Recalled.
Comments/Memo	Optional column.