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Workforce Management Web for Supervisors Help

Scheduled Budget Report

5/11/2025

Scheduled Budget Report

To create a Scheduled Budget Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Scheduled Budget 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 may 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. 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.
6. On the **Date Range** screen, **select** a Start and End Date. Then click **Next**.
7. 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.
8. Click **Finish**.
The report appears in the **Report Viewer**.

Understanding the Scheduled Budget Report

Site [header]	The site's name.
Team [header]	The report is organized team-by-team.
Date Period [header]	The total time period covered by the report.
Day [headers]	For each team, the report displays budget information day-by-day.
Agent	The name of each agent on the team.
Regular Budget	The agent's pay for regular work hours on the given day, based on the agent's hourly wage.
Overtime Budget	The agent's pay for overtime work hours on the given day, based on the agent's hourly wage.
Total Budget	The agent's total pay for the given day.
Number of Agents	Number of agents on the team.
Total Per Day [row]	The entire team's total regular, overtime, and total budgets for the given day.
Total for Team [row]	The team's total regular, overtime, and total

	budgets for the whole selected date range.
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