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Workforce Management Web for Supervisors Help

Time-Off Balance Report

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Time-Off Balance Report

For the agents and dates that you select, this report displays time-off balances for time-off types.

To create a Time-Off Balance Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Time-Off Balance Report** from the list on 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 such a 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. From the **Sort Options** drop-down list, select to sort the report by agent name or by the date for which time off was requested.
Click **Next**.
7. On the **Data** screen, select the agents you want to see in the 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 **Available Time-Off Types** screen, select the time-off types you want to see in the report. Time-off types are grouped by business units and sites.
9. Click **Finish**.
The report appears in the **Report Viewer**.

Understanding the Time-Off Balance Report

Site [header]	The selected site and its time zone.
Team [header]	The team to which the agents in the table below belong. If you selected more than one team, teams are listed in alphabetical order, with the data for agents in one team appearing before the next team name in the list.
Date Period [header]	The dates covered in the report.
Agent	The name of the agent whose information is displayed.
Date	The date for which the agent has submitted a time-off preference. The time-off balance shown in the

Time-Off Balance Report

	Balance column is also for this date.
Description	The name of the time-off type.
Balance	The agent's current number of available time-off hours of the type shown in the Description column, as of the date shown in the Date column.