Workforce Management Web for Supervisors Help

Time-Off Report

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Time-Off Report

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

To create a Time-Off Report:

1. On the **Reports** tab, select **Calendar Reports** from the Views menu.
2. Select **Time-Off 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 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, by the date for which time off was requested, or by the request's date submitted.
7. Optionally, you can select **Show time-off balance**.
8. Optionally, you can select **Show comments** to control whether comments, if any, are shown on the report.
9. Click **Next**.
10. 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.
11. Click **Next**.
12. 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.
13. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Time-Off 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 **Balance** column is also for this date.
Description	The name of the time-off type.
Start Time and End Time	When the time-off period starts and ends. For a full-day time-off request, both columns say `Full Day`.
Status	Whether the time-off preference is Preferred, Granted, Declined, Recalled, Scheduled, or not Scheduled.
Date and Time Submitted	The time at which the time-off preference was made.
Balance	The agent's available time-off hours as of the date of the request.
Comments	Comments, if any, submitted with time-off item.