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Workforce Management Web for Supervisors Help

Workforce Performance Report

12/19/2025

Workforce Performance Report

To create a Workforce Performance Report:

1. On the **Reports** tab, select **Performance Reports** from the Views menu.
2. Select **Workforce Performance 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 (WFM) 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. On the **Date Range** screen:
 - a. Select a Granularity and a corresponding **Start and End Date**. (Your Granularity selection may **restrict** your Date selections.)
 - b. Enter a **Percentage of Deviation Threshold**. (Periods whose actual values differ from the planned values by more than this percentage are listed as noncompliant.)
 - c. Select a time zone.
 - d. Select **Activity**, **Site**, **Activity Group**, **Multi-site Activity**, or **Business Unit** from the drop-down list.
 - e. Click **Next**.
6. On the **Data** screen, select the targets that you want to include in the report's data.
This page's tree displays activities, sites, activity groups, multi-site activities, or business units (depending on your choice of target). If you selected a target other than business unit, the tree's business units expand to display their contents. You can make multiple selections.
7. Click **Finish**. The report appears in the **Report Viewer**.

Understanding the Workforce Performance Report

Root/Site [header]	The name and time zone of the target or site.
Target/Activity or Site [header]	The report is organized by activity, site, business unit, or multi-site activity, depending on the target that you selected in the Reports Wizard.
Date/Date Period	The date or date period selected in the wizard.
Timestep / Day / Week of / Month / X Weeks of	Time periods, corresponding to the granularity that you selected in the wizard.
Actual	The actual staffing for each timestep.

Calculated	The calculated staffing for each timestep. The report shows the calculated value, the difference between calculated and actual values (that is, calculated minus actual), and the difference expressed as a percentage.
Required	The required staffing for each timestep. The report shows the required value, the difference between required and actual values (that is, required minus actual), and the difference expressed as a percentage.
Headcount	The scheduled staffing for each timestep. The report shows the scheduled value, the difference between scheduled and actual values (that is, scheduled minus actual), and the difference expressed as a percentage.
Deviation [footer]	The number of compliant periods. To be compliant, a period's actual values must differ from planned values by less than the Percentage of Deviation Threshold that you set in the wizard.
Deviation %	The percentage of compliant periods.