Workforce Management Web for Supervisors Help

Calendar Audit Report

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Calendar Audit Report

This report can show calendar items modified not only by supervisors, but also by agents. However, the items modified by agents cannot be filtered by the agent name or ID. Instead, all items modified by agents are listed as being modified by the SYSTEM user. An example would be an agent time-off preference. Since time-off preferences are calendar items that can be entered by agents through their Web GUI, this type of calendar item would show up in the Calendar Audit Report as having been modified by the SYSTEM user.

To create a Calendar Audit Report:

1. On the **Reports** tab, select **Audit Reports** from the Views menu.
2. Select **Calendar Audit Report** from the list in the Objects pane.
   The Reports Wizard's first screen, **Header**, appears.
3. To print a header on the report, select **Show Header** and type your header text into the text box. Then (whether you entered a header or not) click **Next**.
4. Complete the **Date Range** screen.
   a. Under **Action Date Range**, do one of the following:
      - Select Start and End dates for supervisor actions in the **Calendar** module.
      - Select the **Any** check box to select any date range for supervisor actions in the **Calendar** module. If checked, the Start and End date fields are disabled.

   b. Under **Actions and Statuses**, check boxes to indicate the actions and statuses that you wish to audit:
      - **Insert**
      - **Edit**
      - **Delete**
      - **Preferred**
      - **Granted**
      - **Declined**
      - **Recalled**

   c. Under **Calendar Items Date Range**, do one of the following:
   d. Select Start and End dates for the agent calendar items you wish to audit.
   e. Select the **Any** check box to select calendar items in any date range. If checked, the Start and End date fields are disabled.
5. Under **Options**, select **Show comments/memo** to control whether comments or memo, if any, are shown on the report.
6. Under **Sort Options**, select one of the following:
   - **By Agent name**

    - **By Supervisor name**
    - **By Timestamp date**
    - **By Calendar Item date**

- Click **Next**.
- On the **Data** screen, under **Available Users**, select the supervisors and other users/agents that you want to include in your report.
- Click **Next**.
- On the second **Data** screen, under **Available Agents**, select the agents to include in the report.
  You can expand business units to display their sites, teams, and agents. You can select agents from multiple sites.
- Click **Next**.
  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:
    - **Availabilities**
    - **Days Off**
    - **Shifts**
    - **Working Hours**
    - **Times Off**
    - **Exceptions**
- Click **Finish**.

  The report appears in the Report Viewer. The report is initially sorted by business unit within the enterprise, by site name within each business unit, then team name (if any) within each site. Further sorting is based on **Sort Options** selected on the **Date Range** screen.

Understanding the Calendar Audit Report

Site [header]	The selected business unit, site, site time zone, and the (first) selected team.
User Name	The name of the user (supervisor) or agent responsible for the action.
Timestamp	The date and time of the supervisor action.
Action	The description of the action. Examples: Insert, Edit, and Delete.
Date	The calendar item day.
Agent	The name of the agent affected by the action.
Type	The item type name. Example: Working Hours.
Name	The calendar item name.
Status	The status assigned by the user. Examples: Granted, Declined.

Comments/Memo	This column appears if **Show Comments** was selected on the **Date Range** screen.