GENESYS™

Workforce Management Web for Supervisors Help

Schedule Summary Report

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Schedule Summary Report

To create a Schedule Summary Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.

2. Select **Schedule Summary 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 **Scenarios** page, 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** page:

   a. Select the radio button for the granularity you want.
      If you select **Intraday**, the report shows the data for one 24-hour period in timesteps. Use the drop-down box to specify timestep granularity: **15** (default), **30**, or **60** minutes.

   b. If you selected **[X]-weeks** granularity, next select the number of weeks to include. You can generate the report for any number of weeks between one and six. This option is unavailable if you selected any granularity other than weeks.

   c. Enter the date range you want displayed in the report. If you have selected to generate the report for a schedule scenario, the dates must fall within the scenario period.

   d. Select the Target type—activity, multi-site activity, activity group, site, business unit—for which you want the report generated. If you select multi-site activity or business unit, the following check box appears: **Use Multi-site Activities**. Leave checked to aggregate report data by multi-site activities.

   e. Click **Next**.

7. Display staffing totals in Full Time Equivalent (FTE) or man-hours mode in this report by selecting the mode in the report wizard. Select the mode by checking or unchecking the **Show staffing totals information in man hours instead of FTE** option. The default value of this option will be the same as the settings in Changing the Staffing Display from FTE to Man Hours.

8. On the **Data** page, select the specific objects that you want to view. Depending on your choice of object type, you can choose to view the enterprise, business units, sites, or activities. Not all options are available for all object types.
   If you select **Activity**, the tree contains the enterprise, business units (if applicable), activity groups (if applicable), sites, and activities. If you select **Site**, the tree contains the enterprise, business units (if applicable), activity groups (if applicable), and sites. If you select **Business Unit**, the tree contains the enterprise and business units. You can generate the report for only the enterprise, one business unit, one site, or one activity.

9. On the **Statistics** page, select the statistics that you want to include in the report by clicking the check

box next to each statistic. You can select up to 18 items from the list. For descriptions of these statistics, see WFM Metrics in the *Workforce Management Administrator's Guide*.
The list of statistics includes these categories:

- Headcount
- Service Level
- Interaction Volume
- AHT
- Budget
- Staffing
- Difference
- Coverage
- ASA
- Occupancy

For each category, there is one or more of these metrics:

- Sch. (Scheduled)
- Frc. (Forecast)
- Diff. (Difference)
- Calc. (Calculated)
- Req. (Required)
- Publ. (Published)

If Master was selected on the **Scenario** screen, the check boxes **Coverage Publ.** and **Coverage Diff.** are enabled and selected by default. This latter column displays the difference between schedule coverage based on the current Master Schedule and schedule coverage based on the baseline Master Schedule.

10. Click **Finish**.
    The report appears in the Report Viewer.

Understanding the Schedule Summary Report

Site Information or Business Unit Information or Enterprise [header]	The site's name and time zone, if you selected activity as the report's target. The business unit's name and time zone, if you selected multi-site activity or site as the report's target. The enterprise, if you selected business unit as the report's target. (Each root is displayed separately.)
Activity, Multi-Site Activity, Site, or Business Unit [header]	The report is organized by activity, multi-site activity, site, or business unit— depending on the target that you selected in the Reports Wizard.
Date/Date Period [header]	The dates covered by the report. The report displays

	separate information for each target and date. This header shows the Date if you selected Intra-day granularity and Date Period for other granularities.
Time Step, Day, Week Of, X Weeks of, Month	The time period shown. The header and the column contents depend on the granularity that you selected.
Coverage [Scheduled]	The scheduled staffing coverage.
Headcount [Scheduled]	The number of agents scheduled.
Service Level Percentage Scheduled	The service level percentage that can be achieved given the staffing coverage, assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.
Service Level Percentage Forecasted	The service level percentage that can be expected to be achieved based on the number of agents forecasted. This may differ from the original service level objective that was stated when the staffing forecast was built due to agent rounding. For example, WFM may forecast a staffing requirement of 12 agents to meet a service level objective of 80% of interactions answered within 20 seconds, but Service Level Percentage Forecast may report a higher number, such as 83.48%. This is because 12 was the minimum number of agents required to meet the 80% service level objective but, with that number of agents, the contact center can be expected to achieve a slightly better service level than 80%. With one less agent (11 agents), the contact center would not be expected to achieve the 80% service level.
Deferred Service Level Percentage Scheduled	The deferred service level percentage that can be achieved given the staffing coverage, assuming that other planned metrics (such as interaction volumes and Average Handling Time) remain unchanged.
Deferred Service Level Percentage Forecasted	The deferred service level percentage that can be expected to be achieved based on the number of agents forecasted.
Interaction Volume Scheduled	The number of interactions that can be handled based on the schedule coverage.
Interaction Volume Forecasted	The expected number of interactions, according to the Master Forecast—assuming that other planned metrics remain unchanged.
AHT Scheduled	The Average Handling Time per interaction, based on the schedule—assuming that other planned metrics remain unchanged.
AHT Forecasted	The expected Average Handling Time, according to the Master Forecast.
Budget Scheduled	The budget for the scheduled coverage for the selected day and target, based on the scheduled agents' paid hours and wages.
Budget Forecasted	The budget for the calculated staffing for the selected day and target, based on the full-time-equivalent (FTE) paid hours per day and salary specified in the scenario.
Staffing Calculated	The required number of agents as calculated by WFM, based on the forecasted interaction volumes, AHT, and applicable service objectives.

Staffing Required	The required number of agents defined by the user, either by explicitly entering forecast targets or by using a template.
Difference Calculated	The difference between Coverage [Scheduled] and Staffing Calculated.
Difference Required	The difference between Coverage [Scheduled] and Staffing Required.
Coverage Publ.	The published staffing coverage.
Coverage Diff.	The difference between schedule coverage based on the current Master Schedule and schedule coverage based on the baseline Master Schedule.