Workforce Management Web for Supervisors Help

Schedule Audit Report

5/7/2025

Schedule Audit Report

This report can show not only schedule changes made by supervisors, but also by agents. However, the schedules modified by agents cannot be filtered by the agent name or ID. Instead, all schedules modified by agents are listed as being modified by the SYSTEM user. An example would be an agent trade that is auto-approved by the system. In this case, no supervisor was involved, and that schedule change would be reported in the Schedule Audit Report as being done by the SYSTEM user.

To create a Schedule Audit Report:

1. On the **Reports** tab, select **Audit Reports** from the Views menu.
2. Select **Schedule 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** page.
   a. Under **Action Date Range**, do one of the following:
      - Select Start and End dates for supervisor actions in the Master Schedule.
      - Select the **Any** check box to select any date range for supervisor actions in the Master Schedule. If checked, the Start and End date fields are disabled.
   b. Under **Actions**, check boxes to indicate the actions that you wish to audit:
      - **Publish**
      - **Cleanup**
      - **Modify**
      - **Trade**
      - **Rollback**
   c. Under **Schedule Date Range**, do one of the following:
      - Select Start and End dates for the schedule days you wish to audit.
      - Select the **Any** check box to select schedule days in any date range. If checked, the Start and End date fields are disabled.
   d. Under **Options**, select **Present action's details** to control whether additional detail on the action is shown on the report. See Understanding the Schedule Audit Report below for more information.
   e. Under **Sort Options**, select one of the following:
      - **By Supervisor name**
      - **By Timestamp date**
      - **By Schedule date**
5. Click **Next**.
6. On the **Data** screen, under **Available Users**, select the supervisors and other users/agents that you

want to include in your report.

7. Click **Next**.
8. 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.
9. 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 Schedule Audit Report

Site [header]	The selected business unit, site, and site time zone.
Date Period	The selection made by the user for **Action Date Range** on the **Date Range** page of the report generation wizard.
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: Publish, Cleanup, Modify.
Date Range	If the Action is **Publish** or **Cleanup**, this column shows the date range for the action. If the Action is **Modify**, this column shows the date of the modified schedule day.
Applied to	If the Action is **Publish**, this column shows the name of the scenario used for the published data. If the Action is **Modify**, this column shows the name of the agent associated with the schedule modification. If the Action is **Cleanup**, this column is empty. Tip If you selected **Present action's details** on the **Data Range** screen, the following applies: If the Action is **Publish** or **Cleanup**, the report lists all affected agents.

If the schedule was changed and you checked **Present Action's Details** on the **Date Range** page, the report displays two tables at the bottom:

- Left-hand table: Original schedule
- Right-hand table: Modified schedule.

The left-hand table contains these columns:

- **Original Schedule**
- **Start Time**
- **End Time**
- **Paid Time**
- **Applied To**

The right-hand table contains these columns:

- **Modified Schedule**
- **Start Time**
- **End Time**
- **Paid Time**
- **Applied To**