Workforce Management Web for Supervisors Help

Schedule Trade Report

5/7/2025

Schedule Trade Report

To create a Schedule Trade Report:

1. On the **Reports** tab, select **Schedule Reports** from the Views menu.
2. Select **Schedule Trade 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 **Date Range** screen, select a Start and End Date.
6. In the **Data Type** section, select each trade status that you want to include in the report. Clear the check boxes for each status that you want to omit. Then click **Next**.
7. In the **Sort Options** screen, select one of two ways to sort the report data, **by Agent name** or **by Date**.
8. On the **Data** screen, select the agents that you want to include in the report.
   You can expand business units expand to display their sites, teams, and agents. You can select multiple agents across teams. You can also select whole teams or a whole site.
9. Click **Finish**.
   The report appears in the Report Viewer.

Understanding the Schedule Trade Report

Site [header]	The site's name and time zone.
Date Period [header]	The date range that you selected in the Reports Wizard.
Proposer: Team, Name	The team and name of the agent proposing each trade.
Respondent: Team, Name	The team and name of the agent responding to each trade proposal.
Trade: Days	The dates included in each trade proposal.
Status	The status of each trade proposal. (If you cleared a status on the Reports Wizard's **Schedule Trade States** screen, trades with that status do not appear in the report.)
Transaction Date	The date on which the trade proposal entered its current status.

Approved By / Declined By	The supervisor who approved or declined the trade proposal, or "Auto-Approved" / "Auto-Declined" if it was done by the system.
Comments	Any comments attached by the supervisor who acted on the trade proposal.