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Workforce Management Web for Supervisors (Classic) Help

Commit/Rollback Multiple Wizard

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Use the wizard to commit or roll back pending schedule changes for selected agents on selected dates.

Related documentation:

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You can use the Commit/Rollback Multiple Wizard in the **Agent-Extended**, **Intra-Day**, or **Weekly** view for schedule scenarios or **Master Schedules**.

Important

You must have the Approve Changes security permission enabled to commit pending changes to the Master Schedule. If you do not, you can use this wizard only to roll back pending changes. If you are working in a schedule scenario, then you can commit/rollback all pending changes.


Approve changes security permission

If you have the **Approve Changes** permission, there are two additional ways to work with pending schedule changes:

- You can approve or reject pending changes to the **Master Schedule** using the Master Schedule Changes Approval module. The **Changes Approval** module enables you to view each pending change before deciding whether to approve or reject them. Using the **Commit/Rollback Multiple Wizard**, you commit or rollback all changes for the selected agents and dates without seeing each change.
- You can commit or rollback all items in an agent's schedule day that have pending status directly in the **Master Schedule Intra-Day** or **Master Schedule Agent-Extended** views. To do so, right-click the row showing the agent's schedule and then select **Commit** or **Rollback**. If you are working in a schedule scenario, you can do this regardless of whether or not you have **Approve Changes** permissions.

Terminology

- **Commit**—*Committing* a pending change makes it part of the **Commit/Rollback Wizard** publically-available scenario or **Master Schedule**. When a schedule scenario is published, only committed changes appear in the **Master Schedule**.
- **Rollback**—*Rolling back* pending changes removes them from possible inclusion in the scenario or **Master Schedule**.
- **Pending**—A schedule change will be put in *Pending* status in three cases:
 1. The user making changes to the **Master Schedule** does not have security permissions to approve changes in the **Schedule** module.

2. The user who is making changes to the **Master Schedule** does have permission to approve changes, but turns off the **Auto-Commit** icon ()

3. The user is working with a schedule scenario and turns off the **Auto-Commit** icon.

In all cases, the user must click **Save** for the changes to be evaluated by the system (and appropriate warnings generated). At that point, the changes go into a **Pending** state if any of the three conditions are met.

Users can see changes that are **Pending** because they will have an upside-down red triangle (yield icon) in the left-most column of the schedule view. However, if the user does have Approve Changes permission and does have the **Auto-Commit** icon enabled, then when the user clicks **Save**, barring any warnings, these changes will become **Committed** to the schedule.

So, with **Pending** changes, the user may invoke the **Commit/Rollback Wizard** to either commit pending changes for selected agents and dates, or roll those pending changes back, which is basically undoing those pending changes for the selected agents and dates.

Using the wizard

To commit or rollback pending changes:

1. From the view's **Actions** toolbar or **Actions** menu, select **Commit/Rollback Multiple**.
If you have unsaved changes, WFM Web prompts you to save them before proceeding. The Commit/Rollback Multiple Wizard's first screen, Select Activities, opens.
2. Select the **activities** whose pending changes you want to commit or roll back.
The Commit/Rollback Multiple Wizard's next screen, Select Agents, opens.
3. Select the agents whose pending changes you want to commit or roll back.
Note that agents without skills are not displayed in the Select Agents screen.
4. Select whether to commit or roll back pending changes.
5. Click **Next**.
6. In the Select Dates screen, select the dates for which to save or delete pending items, and then click **Finish**.
The view reappears.

Select activities

To fill in the **Select Activities** page in the Commit/Rollback Wizard:

1. Select any combination of **activities**.
You can select individual activities from multiple sites and multi-site activities from business units. Only activities that belong to the business unit and sites that are selected on the Object pane's Activities tree are available for selection here.
2. Click **Next** to open the Select Agents page.
Click Cancel if you want to close the wizard without saving or deleting pending changes.

Select agents

To fill in the **Select Agents** page in the Commit/Rollback Wizard:

1. Select any combination of **agents**.
You can select individual agents from multiple sites and multiple teams, or you can select whole teams or whole sites. Only agents who are selected on the Object pane's Agents tree, and who can work on activities that are selected in the first page of this wizard, are available for selection.
2. Select **Commit** or **Rollback**.
If you do not have the Approve Changes security permission, the Commit check box is cleared and disabled. In that case, you can only roll back pending changes.
3. Click **Next** to open the Select Dates page.
Click Cancel if you want to close the wizard without saving or deleting pending changes.

Select dates

The **Select Dates** page in the Commit/Rollback Wizard contains a calendar.

1. Select the **date** or **dates** for which you want to commit or rollback all schedule items.
The calendar works as described in How to use the Calendar.
If you are working with a schedule scenario, be sure to select dates that fall within the scenario's date range.
 2. Click **Finish**.
This action returns you to the Agent-Extended, Intra-Day, or Weekly view. If you committed items, these now appear in the schedule.
- If you want to review or change your entries on the Select Agents page, click **Previous**.
 - Or, if you want to close the wizard without saving your selection, click **Cancel**.