Workforce Management Web for Supervisors (Classic) Help

Delete Multiple Wizard

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Contents

Use the wizard in either Schedule Scenarios or the Master Schedule to delete items from multiple agents' schedules, simultaneously.

Related documentation:

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Using the wizard

To use the Delete Multiple Wizard:

1. In the **Agent-Extended**, **Intra-Day**, or **Weekly** view's **Actions** toolbar or **Actions** menu, select **Delete Multiple**.
   If you have unsaved changes, WFM Web prompts you to save them before proceeding.

2. Select activities from the **Delete Multiple Wizard's** screen Select Activities.

3. Select agents from the **Delete Multiple Wizard's** screen Select Agents.

> Tip
>
> Agents without skills are not displayed in the **Select Agents** screen.

4. Select the agents whose schedules you are editing.

> Important
>
> If you are deleting items from the **Master Schedule** and you have the **Approve Changes** security permission, you can select the **Auto-Commit deleted items** check box to have your items immediately deleted from the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any deletions that you make are pending, and they must be reviewed and approved before they can take effect in the **Master Schedule**. If you are deleting items from a schedule scenario, you have the option to select the **Auto-Commit deleted items** check box. If selected, then your deletions are committed to your schedule scenario. If not selected, then your deletions go into a **Pending** state. They can be committed or rolled back by you using the Commit/Rollback Multiple wizard. Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published.

5. Click **Next**.

6. Select the dates from which to delete items in the Select Dates screen, then click **Next**.

> ### Warning
> Any item that overlaps the dates and times selected will be deleted, even if it overlaps by as little as a minute.

7. In the Select State Types screen, select one or more states. Then click **Next**.

8. Fill in the Select Breaks, Select Meals, Select Exceptions, Select Time Off or Select Marked Time screen that appears next. Then click **Finish**.

The view reappears. If **Auto-Commit** was on, your changes are committed to the schedule. If not, the changes are in a **Pending** mode.

Select activities

To complete the **Select Activities** screen in the Delete Multiple Wizard:

1. Select any combination of **multi-site activities** and **activities**.
   You can expand business units to display their multi-site activities and sites, and expand sites to display their activities. Only objects that were selected at the last time that you clicked Get data are available. By default, all are selected.

2. Click **Next** to apply your selections and continue, or click **Cancel** to make no changes and close the wizard.

Select agents

To fill in the **Select Agents** screen in the Delete Multiple 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.
   The list of available agents is also affected by the filter dialog check box Include agents with matching secondary skills.

2. If you want, select **Delete only if there are no errors** and/or **Show warnings**.

   - If you select the **Delete only if there are no errors** check box, then when you try to save the new items, WFM will not delete any of them if the server returns any schedule validation errors.

   - If you select the **Show warnings** check box, WFM displays any schedule validation warnings that would be generated if you were to delete the items from the agents' schedules.
     If schedule validation errors also occur, WFM does not delete any items from the schedule.

3. If you are deleting items from:

   - The **Master Schedule** and you have the **Approve Changes** security permission, you can select

the **Auto-Commit deleted items** check box to have your deletions immediately made to the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any deletions that you make are **Pending**. They must be reviewed and approved before they can take effect in the **Master Schedule**.

- A schedule scenario, you have the option to select the **Auto-Commit deleted items** check box. If you do, then your deletions are committed to your schedule scenario. If not, then your deletions go into a **Pending** state. They can be committed or rolled back by you using the Commit/Rollback Multiple wizard. Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published.

4. Click **Next** to open the Select Dates screen.
   Click Cancel if you want to close the wizard without saving your selection.

Select dates

The **Select Dates** screen in the Delete Multiple Wizard contains a calendar.

1. Select the date or dates from which you want to delete the schedule items.
   The calendar works as described in How to use the Calendar. If you are deleting from a schedule scenario, you cannot select dates that fall outside of the scenario's date range.

2. Click **Next**.
   The Select State Type screen appears.

Warning

Any item that overlaps the dates and times selected will be deleted, even if it overlaps by as little as a minute.

Select state types

To fill in the **Select State Types** screen in the Delete Multiple Wizard:

1. Select the **state** or **states** that you want to delete. You can delete breaks, meals, exceptions, time off, or marked time.

2. Click **Next**.
   The screen that appears next depends on your selections on this screen. If you are deleting one state type, the screen for that state appears. Otherwise, the screens appear one after the other in the order Select Breaks, Select Meals, Select Exceptions, Select Time Off, and Select Marked Time.

3. To review or change your entries in the Select Dates screen, click **Previous**.
   To close the wizard without saving your selection, click Cancel.

Select breaks

To fill in the **Select Breaks** screen in the Delete Multiple Wizard:

1. Select one or more breaks from the **Select Breaks** list. (If more breaks are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)

   - To select individual items, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.

   - For a range of items, select the first item, hold down the **Shift** key, select the last item in the range. To revise the range, continue holding **Shift** and click the last item to be included in the range.

   The list shows all of the breaks that have been configured for the selected site in the WFM Web. The list's columns show each break's full name, short name, how long it lasts, whether or not the break is paid, and the site in which the break's site name is shown. You cannot select or clear the Paid check box here.

2. If you selected to delete meals, exceptions, time off, or marked time, click **Next**.
   Otherwise, click Finish to delete the selected breaks and close the wizard. This returns you to the Agent-Extended, Intra-Day, or Weekly view.

   - If you want to review or change your entries in the Select State Types screen, click **Previous**.

   - Or, if you want to close the wizard without saving your selection, click **Cancel**.

Select meals

To fill in the **Select Meals** screen in the Delete Multiple Wizard:

1. Select one or more meals from the **Select Meals** list. (If more meals are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)

   - To select individual items, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.

   - For a range of items, select the first item, hold down the **Shift** key, select the last item in the range. To revise the range, continue holding **Shift** and click the last item to be included in the range.

   The list shows all of the meals that have been configured for the selected site in the WFM

Web. The list's columns show each meal's full name, short name, how long it lasts, whether or not the meal is paid, and the site in which the meal's site name is shown. You cannot select or clear the Paid check box here.

2. If you selected to delete exceptions, time off or marked time, click **Next**.
   Otherwise, click Finish to delete the selected meals and close the wizard. This returns you to the Agent-Extended, Intra-Day, or Weekly view.

   - If you want to review or change your entries in a previous screen, click **Previous**.

   - Or, if you want to close the wizard without saving your selection, click **Cancel**.

Select exceptions

To fill in the **Select Exceptions** screen in the Delete Multiple Wizard:

1. Select one or more exceptions from the **Select Exceptions** list. (If more exceptions are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)

   - To select individual items, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.

   - For a range of exceptions, select the first exception, hold down the **Shift** key, select the last exception in the range. To revise the range, continue holding **Shift** and click the last exception to be included in the range.
     The list shows all of the exceptions that have been configured for the selected site in the Policies module of WFM Web. The list's columns show each exception's full name, its short name, whether it is paid, whether it is convertible to a day off, whether it is a full-day exception, and all sites to which the exception is assigned.
     The check boxes simply indicate the exception's configured properties. You cannot select or clear them here.

2. If you selected to delete time off or marked time, click **Next**.
   Otherwise, click Finish to delete the selected exceptions and close the wizard. This returns you to the Agent-Extended, Intra-Day, or Weekly view.

   - If you want to review or change your entries in a previous screen, click **Previous**.

   - Or, if you want to close the wizard without saving your selection, click **Cancel**.

Select time off

To fill in the **Select Time Off** screen in the Delete Multiple Wizard:

1. Select one or more time-off types from the **Select Time Off** list. (If more time-off types are hidden above or below the displayed list items, a vertical scroll bar appears to the right to help you reveal them.)

   - To select individual time-off types, hold down the **Ctrl** key while you select. To de-select, continue holding **Ctrl** and click the item(s) you wish to de-select.

   - For a range of time-off types, select the first time-off type, hold down the **Shift** key, select the last time-off type in the range. To revise the range, continue holding **Shift** and click the last time-off type to be included in the range.

The list shows all of the time-off types that have been configured for the selected site in the Policies module of WFM Web. The list's columns show the full name of each time-off type, its short name, whether it is paid, whether it counts toward the configured time-off limits and all sites to which time off type is assigned.
The check boxes simply indicate the time-off type's configured properties. You cannot select or clear them here.

2. If you selected to delete marked time, click **Next**.
   Otherwise, click Finish to delete the selected time-off items and all other selected items, and close the wizard. This returns you to the Agent-Extended, Intra-Day, or Weekly view.

   - If you want to review or change your entries in a previous screen, click **Previous**.

   - Or, if you want to close the wizard without saving your selection, click **Cancel**.

Select marked time

To fill in the **Select Marked Times** screen in the Delete Multiple Wizard:

1. Select the **marked time items** that you want to delete.

2. Click **Finish** to delete the selected marked time items and all other selected items, and close the wizard.
   You return to the Agent-Extended, Intra-Day, or Weekly view.

   - To review or change your entries in a previous screen, click **Previous**.

   - To close the wizard without saving your selection, click **Cancel**.