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Workforce Management Web for Supervisors (Classic) Help

Insert Multiple Wizard

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


Related documentation:

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Using the wizard

To use the Insert Multiple wizard:

1. In Intra-Day, Agent-Extended, or Weekly view, select **Insert Multiple** from one of the following:

- **Actions** toolbar 
- **Actions** menu
- Right-clicking the **Shortcut** menu (not in **Weekly** view)
The Select Activities screen opens. If you have unsaved changes, WFM Web prompts you to save them before proceeding.

2. Select one or more activities to insert.
The Select Agents page opens.
3. Select the agents whose schedules you are editing. (Agents without skills are not displayed in the **Select Agents** page.)
4. Click **Next**.
5. Select the dates in which to insert items, and then click **Next**.
6. On the Select State Type page, select a state, and then click **Finish** (for a **Day Off**) or **Next** (for other schedule items).
7. Fill in the breaks, meals, exceptions, time off, shift, marked time, or work set selection page that appears next.
8. Click **Finish**.

Auto-committing inserted items

After clicking **Finish** in the wizard, the **Scenario** or **Master Schedule** view reappears:

- If the Auto-Commit inserted items check box was enabled, and you are editing a schedule scenario, your changes are committed to the scenario.
- If the **Auto-Commit inserted items** check box was not enabled and you are editing a schedule scenario, then your changes appear in the schedule in **Pending** mode. You must commit them or roll them back with the Commit/Rollback Multiple wizard.

Pending changes in a schedule scenario are not transferred to the **Master Schedule** when the scenario is published. If you are editing the **Master Schedule**, and the **Auto-Commit inserted items** check box is enabled, then the changes are committed to the **Master Schedule** are visible to all users.

In step 3 of Using the wizard, if you are using the **Insert Multiple** feature in one of the **Master Schedule** views and you have the **Approve Changes** security permission, you can select the **Auto-commit inserted items** check box to have your changes immediately inserted into the schedule. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any inserts that you make are pending, and they must be committed or approved before they can take effect in the official version of the **Master Schedule**.

If you are using one of the **Scenario** views, this check box is always enabled.

If the **Auto-Commit inserted items** check box is not enabled, then changes go into a **Pending** mode and appear to you, but not to other users, in the **Master Schedule** views. Pending changes in the Master Schedule must either be:

- Reviewed and approved/declined by a user with **Approve Changes** permissions (through the Master Schedule Changes Approval view) or
- Committed or rolled back by you, if you have **Approve Changes** permissions, through the Commit/Rollback Multiple wizard.

Select activities

To complete the **Select Activities** page in the Insert 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 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** page in the Insert Multiple Wizard:

1. Select any combination of **agents**.
You can select individual agents from multiple teams, or you can select whole teams or the whole site. Only objects that you had selected the last time you clicked Get data are available.
2. If you want, select **Insert only if there are no errors** and/or **Show warnings**.
 - If you select the **Insert only if there are no errors** check box, then when you try to save the new items, WFM Web will not insert any of them if the server returns any schedule validation errors.
 - If you select the **Show warnings** check box, WFM Web displays any schedule validation warnings

that would be generated if the items were inserted into agents' schedules.

If schedule validation errors also occur, WFM Web does not insert any of your changes into the schedule.

3. If you are editing the **Master Schedule** and have **Approve Changes** security permission, you can select the **Auto-Commit inserted items** check box to have your changes immediately inserted into the **Master Schedule**. If you do not have the necessary security permission, this check box is cleared and disabled. In that case, any inserts that you make are pending, and they must be reviewed and approved before they can take effect in the **Master Schedule**.
 - If you are editing a schedule scenario, you have the option to select the **Auto-Commit inserted items** check box. If checked, your changes are committed to the schedule scenario. If not checked, your changes 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 page.
Click Cancel if you want to close the wizard without saving your selection.

Select dates

The **Select Dates** page in the Insert Multiple Wizard contains a calendar.

1. Select the date or dates into which to insert the schedule items.
The calendar works as described in How to use the Calendar. If you are inserting into a schedule scenario, you cannot select dates that fall outside of the scenario's date range.
2. Click **Next**.
To close the wizard without saving your selection, click Cancel.

Select state type

To fill in the **Select State Type** page in the Insert Multiple Wizard:

1. Select the **state type** that you want to insert.
If you selected agents from more than one site at the Select Agents page, then only these types are available Day Off, Exception, Time Off, Marked Time, and Work Set.
2. Click **Finish** or **Next** (to proceed to the next page).
The button that is enabled depends on the state that you have selected
 - **Finish button**—Enabled if you select Day Off. Click it to insert a day off on the selected dates for the selected agents and close the wizard.
 - **Next button**—Enabled if you select any other state. Click it to open the appropriate wizard page for selecting breaks, meals, exceptions, time off, shift, marked time or work set.
3. To review or change your entries on the Select Dates page, click **Previous**.
Or click **Cancel** to close the wizard without saving your selection.

Select shift

To fill in the **Select Shift** page in the Insert Multiple Wizard:

1. Select the **shift** that you want to insert.
2. If the selected shift ends on the day after it begins, select **Next Day** next to the **End Time** text box.
3. Select the **Automatically Insert Meals and Breaks** check box to enable that function.
4. Click **Next** to open the Select Activity Set page.

Select activity set

To fill in the **Select Activity Set** page in the Insert Multiple Wizard:

1. Select the check box next to each **activity** that you want to insert.
2. Click **Finish**.

Select break

To fill in the **Select Break** page in the Insert Multiple Wizard:

1. Select a **break** from the **Choose Item to Insert** list.
 - Click a single row to select its break. (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.) The list shows all of the breaks that have been configured for the selected site in WFM Web.
The list's columns show each break's full name, short name, how long it lasts, and whether or not the break is paid. You cannot select or clear the Paid check box here.
2. Fill in the **Start time** and **End time** text boxes for this break.
Type in the times that you want, or use the up or down arrows to modify the displayed times.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the break starts on the day after the agents' shifts begin.
— or —
4. Select **Next Day** next to the **End Time** text box if the break begins on the same day as the agents' shifts begin, but ends on the day after.
5. Click **Finish** to insert the selected break and close the wizard.
This returns you to the Intra-Day view.
 - If you want to review or change your entries in the Select State Type page, click **Previous**.
 - If you want to close the wizard without inserting the break, click **Cancel**.

Select meal

To fill in the **Select Meal** page in the Insert Multiple Wizard:

1. Select a **meal** from the **Choose Item to Insert** list.
 - Click a single row to select its meal. (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.) The list shows all of the meals that have been configured for the selected site in WFM Web.
The list's columns show each meal's full name, short name, how long it lasts, and whether or not the meal is paid. You cannot select or clear the Paid check box here.
2. Fill in the **Start time** and **End time** text boxes for this meal.
Type in the times that you want, or use the up or down arrows to modify the displayed times.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the meal starts on the day after the agents' shifts begin.
— or —
4. Select **Next Day** next to the **End Time** text box if the meal begins on the same day as the agents' shifts begin, but ends on the day after.
5. Click **Finish** to insert the selected meal and close the wizard.
This returns you to the Intra-Day view.
 - If you want to review or change your entries in the Select State Type page, click **Previous**.
 - If you want to close the wizard without inserting the meal, click **Cancel**.

Select exception

To fill in the **Select Exception** page in the Insert Multiple Wizard:

1. Select a **exception** from the **Select Exception** list.
 - Click a single row to select its exception. (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.) The list shows all of the exceptions that have been configured for the selected site **Policies** module of WFM Web.
The list's columns show each exception's full name, short name, whether it is paid, whether it counts as time off, whether the exception is convertible to a day off, whether it is a full-day exception, and all sites to which it is assigned.

Tip

The check boxes simply indicate the exception's configured properties. You cannot select or clear them here.

2. If the **Start time** and **End time** text boxes are enabled, fill them in for this exception.
Either type in the times that you want, or use the up or down arrows to modify the displayed times.

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3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the exception starts on the day after the agents' shifts begin.
— or —
 4. Select **Next Day** next to the **End Time** text box if the exception begins on the same day as the agents' shifts begin, but ends on the day after.
 - If you selected a full-day, paid exception, you can select the **Specify Paid Hours** check box to enter a duration other than the default number of hours in a work day.
 - If you select the **Specify Paid Hours** check box, the **Paid Hours** text box becomes editable.
 5. Click **Finish** to insert the selected exception and close the wizard.
This returns you to the **Intra-Day** view.
 - If you want to review or change your entries in the Select State Type page, click **Previous**.
 - If you want to close the wizard without inserting the exception, click **Cancel**.

Important

WFM requests approval to insert new exceptions that overlap existing exceptions with this message for each exception/agent instance: *Warning: Newly inserted state Exception name (date & time) is replacing an existing state exception name (date & time) that it overlaps.* All requests appear in the Review Messages dialog box, where you can approve or reject each instance. This behavior applies only to part-day exceptions that overlap part-day exceptions; other instances (such as full-day exceptions) are still rejected.

Select time off

To fill in the **Select Time Off** page in the Insert Multiple Wizard:

1. Select a **time-off** type from the **Select Time Off** list.
 - Click a single row to select its time-off type. (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.)
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 each time-off type's name, short name, whether or not the time off is paid, whether the time off counts toward the configured time-off limits, and all sites to which **Time Off** is assigned.
 - Select the **Show all** check box to display all **Time-Off** types.
Clear the check box to display only the **Time-Off** types that are applicable to the selected agent.
See the Time-Off Primer in the *Workforce Management Administrator's Guide*.

Tip

The **Paid** and **Counts** check boxes are informational only. You cannot select or clear them.

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2. If the **time-off** item is part-day, fill in the **Start time** and **End time** text boxes. Type in the times that you want, or use the up or down arrows to modify the displayed times.
 3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the time-off period starts on the day after the agents' shifts begin.
— or —
 4. Select **Next Day** next to the **End Time** text box if the time-off period begins on the same day as the agents' shifts begin, but ends on the day after.
 5. If the time off is for the entire day, select the **Full Day** check box. This disables the start time and end time text boxes.
 6. Click **Finish** to insert the selected time off and close the wizard.
This returns you to the **Intra-Day** view.
 - If you want to review or change your entries in the Select State Type page, click **Previous**.
 - If you want to close the wizard without inserting the time off, click **Cancel**.

Select marked time

To fill in the **Select Marked Time** page in the Insert Multiple Wizard:

1. Select the **marked time** that you want to insert.
2. Adjust the **Start time** and **End time**, as necessary.
3. Select **Next Day** next to the **Start Time** and **End Time** text boxes if the marked time starts on the day after the agent's shifts begin.
— or —
4. Select **Next Day** next to the **End Time** text box if the marked time begins on the same day as the agent's shifts begin, but ends on the day after.
5. Click **Finish**.

Select work set

In WFM, *work sets* are used to configure the time interval within the shift when agents are working only on specified activities. You can include several activities or a single activity set into a work set.

Insert work sets by using the steps described in the procedure below or by selecting it in the Intra-day view's pop-up menu (using a right-click, in the same way you insert other items, such as time off, exceptions, or marked time).

In the Insert Multiple Wizard, select **Work sets** using 1 or 2 pages, depending on your choice:

- Specify work set parameters
- Select activities for work set screen

Specifying work parameters

1. Select or enter the Start time and End times.
2. Select **Next Day** (next to the **Start Time** text box) if the work set starts on the day after the agent's shifts begin.
— or —
Select Next Day (next to the End Time text box) if the work set begins on the same day as the agent's shifts begin, but ends on the day after.
3. Select one of these radio buttons:
 - Select new activities for Work Set—Enables the Select activities for work set screen, where you select the new activities.
 - **Use existing shift activities**—Applies the activities already selected.
4. Select or clear the check box Mark as overtime with marked time.
Select to enable the Marked Time page when you're done with activities.
5. Click **Next** (if you selected the radio button **Select new activities for Work Set** or the check box **Mark as overtime with marked time**) or click **Finish**.

Selecting activities for work sets

This page appears only if you selected the **Select new activities for Work Set** radio button.

1. Select one or more activities from the tree.
2. Click **Next** (if you selected the check box Mark as overtime with marked time in the previous page) or click **Finish**.

Marked time with overtime

Important

This page in the wizard appears only if you checked the **Mark as overtime with marked time** check box on the Specify work set parameters page of this wizard.

To fill in the **Select marked time with overtime** page in the Insert Multiple Wizard:

1. Select a **Marked Time**.
2. Click **Finish**.
If you want to close the wizard without inserting the marked time, click Cancel.

Check review messages

Use the **Review Messages** dialog box in the Insert Multiple Wizard to respond to any warnings returned when you tried to save agents' edited schedules.

1. For each **Warning** that is listed, check the items you want to insert and then click **Insert for selected**.
To select all **Warnings**, use the **Select All Warnings** check box.
2. Review all **Errors**.
You cannot select the check box next to the **Error**.

To cancel out without applying any changes, click **Close**.

The **Review Messages** dialog box includes the following columns and controls:

| | |
|----------------------------|--|
| Date | Displays the schedule date. |
| Agent | Displays the agent whose schedule generated this message. |
| Team | Displays the agent's team. |
| Message | Displays the message type (either Warning or Error), and the message text itself. |
| Select All Warnings | Marks the check box for all Warnings . |
| Insert For Selected | Closes the dialog box, applies your selected actions, and retrieves fresh data from the server. |
| Close | Closes the dialog box without saving or refreshing data. |

Important

These errors and warnings are generated by schedule changes that you made manually in the **Agent-Extended**, **Intra-Day**, or **Weekly** view. They differ from Validation warnings and errors, which WFM Web generates during the schedule building process.