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Workforce Management Web for Supervisors (Classic) Help

Master Schedule Changes Approval

9/14/2025

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View and approve pending schedule changes made by others.

Related documentation:

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You must have **Schedule Approve Changes** security permission to view and use the **Master Schedule Changes Approval** modules. If you do not, you cannot see this module in the **Modules** tree.

Changes that are made to the **Master Schedule** by users who do not have the **Schedule Approve Changes** security permission are first entered in **Pending** mode. Use the **Master Schedule Changes Approval** module to accept or reject these pending changes.

Alternatively, for pending changes that you made, you can:

- Use the Commit/Rollback Multiple Wizard to commit or rollback all pending changes for selected agents on selected dates.
- Use the **Schedule Intra-Day** views to directly save or delete all items in an agent's schedule day that have **Pending** status. To do so, right-click the row showing the agent's schedule and then select **Commit** or **Rollback**.

Displaying pending changes

1. From the **Home** menu on the toolbar, select **Schedule**.
2. From the **Schedule** menu on the toolbar, select **Master Schedule**.
3. From the **Master Schedule** menu, select **Master Schedule Changes Approval**.
4. On the Objects pane, select the appropriate item(s) from either the **Agents** tree (above) or the **Activities** tree (below); WFM then selects matching item(s) from the other tree.
You can expand business units to display their sites, and you can expand sites to display their teams and agents. You can select multiple sites, teams, and agents, but just one business unit.
5. From the **Period** drop-down list, select the time period to view. You can select **Daily** or **Weekly**.
6. From the **Users** drop-down list, select which user's changes you want to see. Select **All** to see all pending schedule changes. **All** is selected by default.
7. Use the date selectors to change the schedule dates to view.
By default, if you chose to view the **Weekly** period and select a day other than the first day of the week, the display begins on the first day of the week containing the day you selected.
8. Click **Get data**.
The top pane of the Changes Approval view displays a table containing the pending schedule changes made by the users you selected. The columns in the table are sortable. The columns in the Pending Changes table are the following

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- **Date**—The schedule date that has been changed.
 - **User**—The user who made the change, or **Changed by Agent** if an agent made the change.
 - **Agent**—The agent whose schedule has been changed.
 - **Site**—The site to which the affected agent belongs.
 - **Team**—The team to which the affected agent belongs.

Approving and rejecting pending changes

1. Select one or more schedule changes in the pending changes table.
The current version of each affected agent's schedule, and the agents' schedules as they would appear with the changes incorporated, appear in the **Original Schedule** and **Modified Schedule** panes below the table.
 - **Original Schedule** pane—Shows the agent's schedule as it appears in the current version of the **Master Schedule**.
 - **Modified Schedule** pane—Shows the agent's schedule with the pending changes included.These panes contain the following columns:
 - **Item**—The name or type of the changed item. For shifts and activity sets, this column displays all of the associated activities.
 - **Start Time**—The start time of the changed item. For full-day items, this column is empty.
 - **End Time**—The end time of the changed item. For full-day items, this column reads **Full Day**.
 - **Paid Hours**—The number of paid hours in the schedule.
 - **Colors**—Items that do not match in the original and edited schedules appear in specific colors. Non-matching items in the original schedule pane are marked in blue. Non-matching items in the **Modified Schedule** pane are marked in green.
2. To see whether the changes violate any schedule constraints, select the change in the pending changes table and then click **Validate**.
The Review Validation Messages dialog box opens. See Schedule Validation for a list of possible error and warning messages and their descriptions.
3. After reviewing the changes, select one or more of them and then click **Accept** to save the changes in the **Master Schedule** or **Reject** to discard them.
The **Master Schedule** is updated to include all accepted schedule changes.

Warning

If you accept or reject any pending change for an agent, all pending changes for that agent are accepted or rejected.

Filter by agent properties

You reach this dialog box by clicking the **Filter** button in the Master Schedule Changes Approval dialog box.

Use this dialog box to filter the display by specific agent properties. You can choose from two lists of **Contracts** under the current site:

All check boxes are selected by default.

1. Clear the check boxes for the items that you want to be excluded from the filter.
2. Click **OK** to apply your choices.

Review validation messages

Use the **Review Validation Messages** dialog box to view any warnings or errors that the server returned when you validated the selected pending changes to the **Master Schedule**.

The dialog box contains the following columns and controls:

Date	Date of the message.
Agent	The agent whose schedule change generated the message.
Team	The team to which the agent whose schedule is being changed belongs.
Message	The message type (either Warning or Error), numeric code, and the message text.
OK	Closes the dialog box.

Important

These errors and warnings would be generated if you validated the selected pending schedule changes. They differ from Validation warnings and errors, which WFM Web generates during the schedule building process.