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Workforce Management Web for Supervisors Help

[Edit Multiple Wizard](#)

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Edit Multiple Wizard

Use the Edit Multiple function to edit one or more items from agents' schedules at once. You can use the Edit Multiple Wizard by opening it from the toolbar or **Actions** menu in the following views:

- **Scenarios > Intra-Day**
- **Scenarios > Agent-Extended**
- **Master Schedule > Intra-Day**
- **Master Schedule > Agent-Extended**

To use the wizard:

1. In the **Intra-Day** or **Agent-Extended** view, use the **Actions** menu to open the wizard by selecting **Edit Multiple**, or click the icon in the toolbar.
2. When the wizard opens, make the appropriate selections and change settings, as necessary, in each of the following screens (as described below):
 - **Select date**
 - **Select activities**
 - **Select agents**
 - **Select state types**
 - **Select states**
3. Click **Finish**.

When the view reappears:

- If the **Auto-Commit inserted items** check box is enabled, and you are editing a schedule scenario, your changes are committed to the scenario.
- If the **Auto-Commit inserted items** check box is 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** and visible to all users.

Select date

This page in the wizard contains a calendar.

1. Select the date for the schedule items you want to change.
If you are editing a schedule scenario, you cannot select dates that fall outside of the scenario's date range. The calendar works as described in [How to Use the Calendar](#).
2. Select a **Start Time** and **End Time** and, if applicable, check the **Next Day** check box.
3. Select the **Time Zone**.
If you select Local or User for time zone, agent states will display in the time zone of the agent's site. Keep this in mind if you are selecting agents from multiple sites.
4. Click **Next**.
If you want to close the wizard without saving your selection, click Cancel.

Select activities

1. Select any combination of **activities** and **multi-site activities**.
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

1. Select any combination of **agents**.
2. Select individual agents from multiple teams, or you can select whole teams or the whole site. Only objects that you selected the last time you clicked **Get data** are available.
3. Optionally, 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 and 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 changes into the schedule.
 - 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 next dialog in the wizard, or click **Cancel** if you want to close the wizard without

saving your selection.

Select state types

1. Select the **state type** that you want to edit: **Breaks**, **Meals**, **Exception**, and **Time Off**.
Only part-day exceptions and time off are displayed. You cannot edit full-day items when using this wizard.
2. Click **Next** (to proceed to the next page).
3. To review or change your entries in other dialog in the wizard, click **Previous**, or click **Cancel** to close the wizard without saving your selection.

Select states

1. Select the agents' states you want to change, and then make changes by clicking the following radio buttons and check boxes:
 - **Move start time**—Enter a new start time and click either the **Forward** or **Backward** radio button.
 - **Set start time**—Enter a new start time and, if applicable, check the **Next Day** checkbox.
 - **Change duration**—Click the check box to enable and enter a new value for the duration.
 - **Move to date**—Click the check box to enable and enter a new value for the date within 6 weeks of the schedule date range. WFM will display an error if you select dates outside of this limit.
2. Click **Finish**.
After making changes in this screen and clicking Finish, the Review Messages dialog might open to display error or warning messages. To understand when and why it sometimes appears, see [Review Messages](#).

Review Messages

In the Edit Multiple wizard, the **Review Messages** dialog contains any warnings or errors that display if the start and end times entered in the **Select state types** page are not within the shift's time range. Depending on what values you change, you'll see one of two error messages:

- *Error: The start time and end time of the state must be within the agent's day range.*
- *Error: The duration of agent state must be greater than 0.*

If the new values for start and end time or duration for the selected state are not within an acceptable range for the agent's shift, the **Repeat update** button is disabled. If you click **Back**, the changed values appear in red. Only after you've changed the value to within an acceptable range will they appear in black again and no further error messages will display.

The dialog contains the following details:

Team Name	The team to which the agent belongs.
Agent Name	The agent whose schedule item is being changed.
Date	The date that the message was generated.
Messages	The message type (either Warning or Error), numeric code, and the message text.
Action	<p>Click one of two buttons:</p> <ul style="list-style-type: none">• Back—Enables you to go back and change the values you initially entered (if you receive an error message).• Repeat update—Enables you to retry the values you initially entered.
Close	Closes the dialog box and does not retrieve fresh data from the server.
Help	Displays this help topic.