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Workforce Management Web for Supervisors Help

Insert Multiple Wizard


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Insert Multiple Wizard

Use the **Insert Multiple Wizard** (IMW) to add an item, such as a break, into multiple agents' schedules at once. You can use it in either **Scenarios** or the **Master Schedule**.

Using the Insert Multiple Wizard

To use the 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**.

When the 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.

Auto-Committing Inserted Items

In step 3 above, 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.