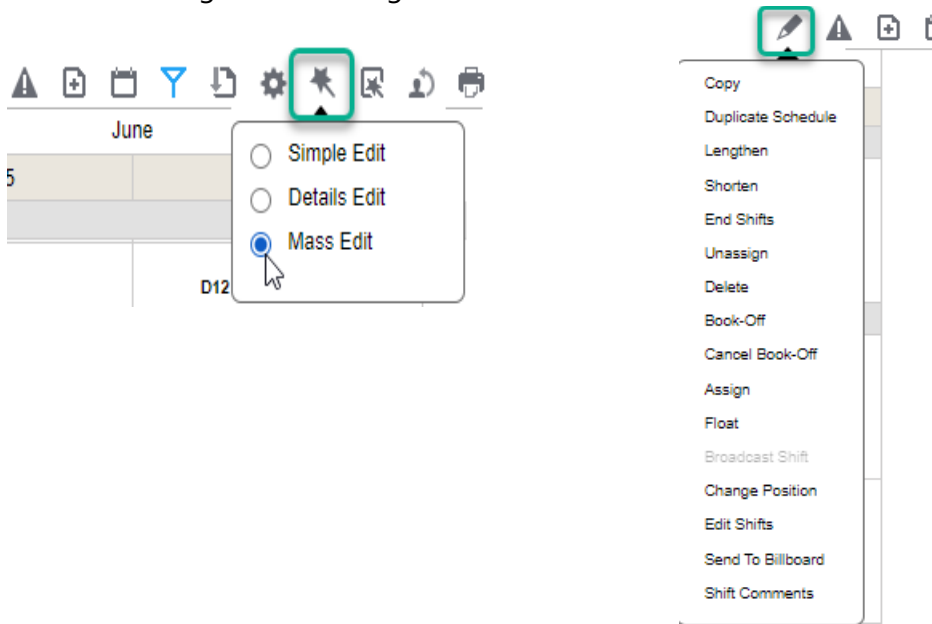


## HOW TO USE MASS EDIT

Log into WFM Schedule Admin. Load the schedule for the team to edit schedules. The system defaults to the Details Edit mode. From the function tools in the top-right corner of the page, select the wand icon, Edit Mode, and then select Mass Edit.

A pencil icon is added to the beginning of the filter tools. Select the pencil icon to see the various functions available through mass editing:



**You will follow the below steps for all mass edit functions:**

1. Select the shift(s) from the schedule calendar to be edited, they will be shaded green
2. Select the pencil icon from the function tools
3. Select the function to be used
4. Fill in parameters and Save

**Below are a some of the common uses with steps**

**Book off shifts for an employee or multiple employees for a shift:**

1. Select the shifts to book-off. The shifts can be from one employee or multiple employees
2. Select the pencil icon and then, select Book-Off
3. Select the book-off code and then add comment if applicable – you have the option to apply one book-off code to all or select various book-off codes
4. Select Submit—the shifts display with the book off codes selected, & are usually shaded dark orange

**Add shifts for an employee or multiple employees, using Copy, for scheduled or unassigned shifts:**

1. Select shifts for the shift time and job that the employee needs to be scheduled
2. Select the pencil icon and then, select Copy
3. Find and select the employee’s name using the lookup icon by typing the last name in the Name box (or use the short-code key of % and type their first name)

4. Repeat step 3 for each shift or if the same employee will be added for all shifts copy & paste ID found in step three – Note: You can copy and paste a group of IDs when adding the shifts for several employees and then select Save

**Note:** You can change any field: Work Date, Start Time, End Time, Unit, Position, or Activity for any or all shifts before saving. For example: Change the WRK activity to ORI, if adding a shift for an employee in orientation.

#### Add a Schedule for an Employee using Unassigned Shifts:

1. Select unassigned shifts for the scheduled dates/shift/job
2. Select the pencil icon and then, select Assign
3. Select the employee and Save

#### Change multiple scheduled shifts to a new location (unit/clinic) using Float:

1. Select unassigned shifts for the scheduled dates/shift/job
2. Select the pencil icon and then, select Float
3. Fill in the Float Wizard information and Save

#### Change the Position for Shifts (one or more employee shifts), for scheduled or unassigned shifts:

1. Select the scheduled shifts to update
2. Select the pencil icon and then, select Change Position
3. Enter new position and Save

#### Send Unassigned Shifts to the Billboard:

1. Select the Unassigned shifts for dates you want to post to the billboard
2. Select the pencil icon and then, select Send to Billboard
3. Select the Billboard Group or Groups that you want to post the shifts, and then select Submit - *The Unassigned shifts will now display with the clipboard icon, indicating they are available to employees for scheduling*

**Note:** To select more than one group, select one group, and then hold down the control key on the keyboard and then select additional group, repeat until all groups have been selected that you want to post shifts.

#### Remove an Employee's Schedule (employee resigned, changed shift times, or was added in error):

1. Select the scheduled shifts to be removed
2. Select the pencil icon, and then select Unassign and Save – the schedule is removed and unassigned (gold) shifts are created

**Note:** You could then select the unassigned shifts that were created and send to the billboard using the steps above. The shifts will have a small asterisk after the shift time indicating the shift was changed.

#### Remove a group of shifts from the billboard:

If an unassigned shift is posted to the billboard is changed, then it will be removed from the billboard. You need to change the job of some of the billboard shifts from RN to RN-IP, select the shifts, follow the change position steps above and then follow the steps for sending to the billboard.

If you do not need to amend the shift, but you want to remove them from the billboard:

1. Select the unassigned shifts to be removed, select the pencil icon, and then select Shorten
2. Type 1 in the min box, leave End selected, and then select Save.

Since you changed the shifts, they were removed from the billboard. To change the shifts back to their original time, repeat above steps, except select Lengthen – they are still no longer posted to the billboard.