MONET | SOFTWARE

New Feature Announcement
Release Q1-WFM-2018

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Overview

We have updated Monet WFO with these new features:

- **Preserve**. Existing mid-day exceptions, breaks, lunch, and non-call activities can be kept in place when adding a large mid-day exception to a shift. Instead of overwriting an entire day's activities with a mid-day exception, smaller mid-day exceptions will be automatically created to fill in the space around existing activities.

- **Automatic Selection for Skill Codes/Teams** in View Forecast, Forecast Reports, and Intra-day.

- **Enable/Disable Submit Anyways Button**. If an agent does not have sufficient hours in Personal Hours or Time Off Hours to cover a change request, the Submit button is disabled in their Agent Portal view.

Check out this guide for an overview of all the changes. We hope you enjoy these improvements!

Benefits and Advantages

- **Preserve**: Administrators can enter a mid-day exception that covers a complete schedule, and have Monet automatically create smaller exceptions around the other existing activities like breaks, lunch, non-call, and other exceptions.

- **Automatic Selection for Skill Codes/Teams**: When Skill Codes or Teams are selected, the Auto function not only selects all relevant skill codes, but teams connected to those skill codes as well. This saves time in large contact centers when viewing forecasts, forecast reports, or Intra-day.

- **Enable/Disable Submit Anyway Button**: Supervisors save time when handling change requests that would not otherwise be approved because an agent has insufficient Time Off or Personal Hours." Agents will no longer be able to submit such requests.

Preserve

Exception Conflict Resolution

When an exception conflicts with another scheduled activity, the existing activity can be overridden, moved, truncated, or preserved.
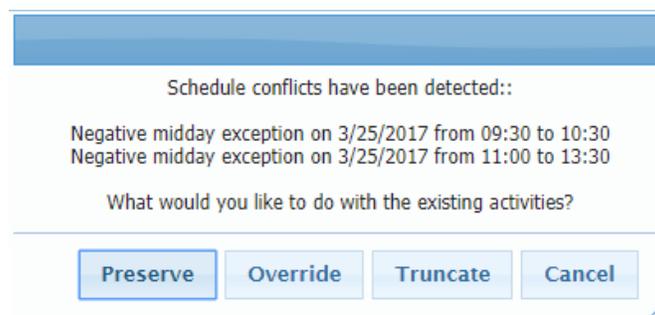
The Preserve functionality is available when creating mid-day exceptions under Staff > View Roster, View Roster By Agent, Graphical View; Manage > Exception Calendar; and Employees > Employee List.

Exception Conflict Resolution Handling by Situation

Overlap:

The new exception only occupies the space before or after the existing exception. If there is a full-Overlap that exceeds Both Start and End Times of an existing exception, two new exceptions are created to fill in the space around the existing exception and the existing exception is left intact.

After the Roster is Generated:

Preserve becomes available if there are any conflicts with existing activities other than "Available" time:

- Breaks
- Lunch
- Non-call
- Mid-day negative or neutral exceptions

Before the Roster is Generated:

Preserve becomes an option before the schedule is generated if:

- The Administrator inputs a new mid-day exception that conflicts with an existing mid-day exception.
- The new exception must conflict and be greater than either the start or end time of the existing exception, or both.

Personal Hours and Time Off Hours Handling:

If the new exception contains Personal Hours or Time Off Hours, the value for the exception being entered is split proportionally across the new exceptions being created.

Break and Lunch:
- **Move/Move Always/Override** break and lunch handling is taken from the exception as it is created.
- The conflict resolution dialog is only shown when a break or lunch will be overridden, regardless of the **Move/Move Always/Override** selection. When this dialog is received, Preserve is an option. If the break or lunch can be moved with the **Move/Move Always** selection, the dialog is not shown.
- The dialog is always brought up if **Override** is selected, and an existing activity will be deleted.
- The **Preserve** option will always display except in one case:
    - The exception does not exceed either the start nor the end of the existing activity (multiple if the existing activities are adjacent).
    - If neither the start nor end time of the new exception goes beyond the start or end time of the existing activities, then the **Preserve** option is not displayed.
- When the Administrator selects **Override**, the conflict dialog is brought up. The Administrator selects **Preserve**; then the breaks and lunch are kept in place.

A dialog displays showing conflicts were detected, when an exception conflicts with other scheduled activities. Choose to **Preserve** the existing activities, **Override**, **Truncate**, or **Cancel** the exception addition.

Submit Anyways

When agents submit schedule change requests (and do not have the Time Off Hours or the Personal Hours required to get the request approved), the agent has the option to submit the request anyway. In the Anywhere Options screen, Administrators can now disable agents from submitting schedule change requests when they do not have the Time Off Hours or the Personal Hours available.

Disable request submission when Personal Hours requirement not met	☑
Disable request submission when Time Off Hours requirement not met	☑
Maximum number of seconds before alert popups are automatically closed	0
	Submit

- Disable request submission when Personal Hours requirement is not met
- Disable request submission when Time Off Hours requirement is not met

Checking either or both boxes removes the "Submit Anyway" option from the dialog when the criteria is not met.

Depending on the setting in Anywhere options, the Submit Anyway button will be visible, or hidden.

Time Off or Personal Hours Available

Insufficient Time Off or Personal Hours

Auto Skill Code and Team Selection

An extra option has been added to the Skill Code and Team drop-downs on the View Forecast, Forecast Reports, and Intra-day screens that automatically selects the relevant Skill Codes or Teams. When an Administrator selects a skill(s) on the Forecast screen, all Teams that Skill Code belongs to are automatically selected. The same goes in reverse: when an Administrator selects a Team(s), all Skill Codes that belong to that Team are auto-selected as well.

- The Auto option is a button in the Skill Code and Skill Team drop-downs.
- Auto: is the new default setting.
- The Auto filtering setting status is shown when the drop down is opened:
    - Active: Auto Filtering Enabled
    - Inactive: Enable Auto Filtering
- The Auto option is remembered with other settings by the Sticky Filters feature.
- When the Auto setting is enabled, the word "Auto" is presented before the normal list of skill codes or teams that would be displayed with the filter applied
- This feature supports multiple drop-down selections.

Important Note About Functionality:

- **An Auto filter setting applies directly to that drop-down, but the effect of that Auto filter setting is seen when selecting an option on the opposite drop-down.**
    - Example: When the Skill Team setting for Auto is enabled, any Skill Team that includes a Skill Code that is filtered on the Skill Code drop-down will be automatically selected (and vice versa).

Intra-Day

View Forecast

Forecast Reports

If there are any questions on this process, please contact Monet Support at support@monetsoftware.com, or at 310-207-6800, Opt #2.