

# New Feature Announcement

## Release Q1-WFM-2018

### Table of Contents

Overview .....	2
Benefits and Advantages.....	2
Preserve.....	2
Exception Conflict Resolution .....	2
Exception Conflict Resolution Handling by Situation .....	3
Overlap:.....	3
After the Roster is Generated: .....	3
Before the Roster is Generated:.....	3
Personal Hours and Time Off Hours Handling:.....	3
Break and Lunch:.....	3
Submit Anyways .....	4
Time Off or Personal Hours Available.....	4
Insufficient Time Off or Personal Hours.....	4
Auto Skill Code and Team Selection.....	5
Intra-Day.....	5
View Forecast.....	6
Forecast Reports .....	6

## 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!

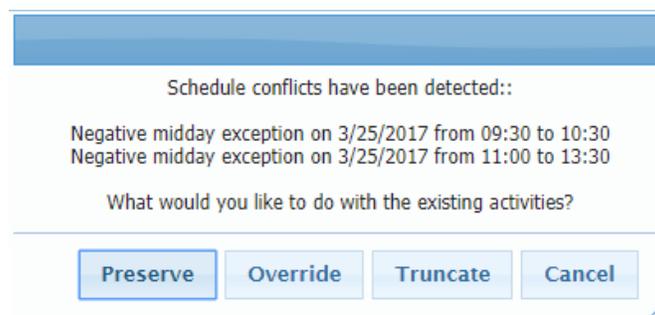
## Benefits and Advantages

- **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	<input checked="" type="checkbox"/>
Disable request submission when Time Off Hours requirement not met	<input checked="" type="checkbox"/>
Maximum number of seconds before alert popups are automatically closed	<input type="text" value="0"/>

- 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*

**Agent Access**

Exceptions Submitted

The exception requested cannot be submitted because it exceeds the allowed number of Personal Pool hours available on the following days:

Date	Personal Pool Hours Requested
03/14/2018	8

**Submit Anyways**  
 Cancel  
 Edit the Change Request

### *Insufficient Time Off or Personal Hours*

**Agent Access**

Exceptions Submitted

The exception requested cannot be submitted because it exceeds the allowed number of Personal Pool hours available on the following days:

Date	Personal Pool Hours Requested
03/14/2018	8

**Cancel**  
 Edit the Change Request

## 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

Wednesday [05:00 - 22:00] Date: Wednesday, January 31, 2018 Export To Excel

Skill Code: 510 Team: Auto: Media, Omni

Time	Fcst AHT	Act AHT	A/F Ratio	Act Aban	FSL	ASL	Var	Curr Req	Curr As...	+/-	Occ
157	157	1	0	100	0	-100	6	6.00	0	70.21	
157	157	1	0	100	0	-100	4	6.00	2	67.54	
181	0	0	0	100	100	0	20	12.00	-8	74.79	
181	181	1	0	100	0	-100	19	12.00	-7	76.35	
182	0	0	0	100	100	0	6	14.00	6	51.12	
0	0	0	0	100	100	0	0	11.00	11	0	
0	0	0	0	100	100	0	0	11.00	11	0	
0	0	0	0	100	100	0	0	12.00	12	0	

Wednesday [05:00 - 22:00] Date: Wednesday, January 31, 2018 Export To Excel

Skill Code: 510 Team: Auto: Media, Omni

Time Ending	Fcst	Act	A/F Ratio	Fcst AHT	Act AHT	A/F Ratio	Act Aban	FSL	ASL	Var	Curr Req	Curr As...
05:15	2	2	1	157	157	1	0	100	0	-100	6	6.00
05:30	1	1	1	157	157	1	0	100	0	-100	4	6.00
05:45	6	0	0	181	0	0	0	100	100	0	20	12.00
06:00	4	4	1	181	181	1	0	100	0	-100	19	12.00
06:15	2	0	0	182	0	0	0	100	100	0	6	14.00
06:30	0	0	0	0	0	0	0	100	100	0	0	11.00
06:45	0	0	0	0	0	0	0	100	100	0	0	11.00
07:00	0	0	0	0	0	0	0	100	100	0	0	12.00

### View Forecast

Wednesday (05:00 - 22:00) Date: Wednesday January 31 2018 Weighted Total Tasks 327 Average AHT 180 Team: Auto: Media, Omni

Skill Code: 510

Enable Auto Filtering

Threshold Delay	Probability Delay	ASA	Req Agents	Unsch. Act	Adj Agents	Occ	Handled	Abn	Handled < T
20	80	20	0.57	1	6	69.59	2 100%	0 0.00%	2 1
20	80	20	0.35	0	4	67.54	1 100%	0 0.00%	1 1
20	80	20	1.35	3	20	74.79	5 100%	0 0.00%	5 1
20	80	20	1.05	2	19	76.28	4 100%	0 0.00%	4 1
20	80	20	0.53	1	6	50.78	2 100%	0 0.00%	2 1
20	80	20	0	0	0	0	0 0.00%	0 0.00%	0 0.
20	80	20	0	0	0	0	0 0.00%	0 0.00%	0 0.

Wednesday (05:00 - 22:00) Date: Wednesday January 31 2018 Weighted Total Tasks 327 Average AHT 180 Team: Auto: Media, Omni

Skill Code: 510

Primary Forecast

Time Ending	Tasks	AHT	Threshold Delay	Probability Delay	ASA	Req Agents	Unsch. Act	Adj Agents	Occ
05:15	2	157	20	80	20	0.57	1	6	65
05:30	1	157	20	80	20	0.35	0	4	67
05:45	6	181	20	80	20	1.35	3	20	74
06:00	4	181	20	80	20	1.05	2	19	76
06:15	2	182	20	80	20	0.53	1	6	50
06:30	0	0	20	80	20	0	0	0	0
06:45	0	0	20	80	20	0	0	0	0

Auto Filtering Enabled

- All Calls
- Media
- New Hire
- Omni

### Forecast Reports

Reports

- Forecast Report
- Distinctive Day Summary Report
- Distinctive Day Detail Report

Parameters

Skill Team: New Hire

Skill Code:  Check All  Uncheck All

Interval: Enable Auto Filtering

From Date:  All Calls

To Date: Wednesday, January 31, 2018

Media

New Hire

Omni

View Report

Reports

- Forecast Report
- Distinctive Day Summary Report
- Distinctive Day Detail Report

Parameters

Skill Team: New Hire

Skill Code: Auto: General Info S10, Orders S10

Interval:  Check All  Uncheck All

From Date: Auto Filtering Enabled

To Date: Wednesday, January 31, 2018

- Billing S10
- Chat S10
- Email S10
- General Info S10
- Orders S10
- Outbound S10

View Report

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