

Monet

Scheduling, PTO/UTO, MOT, Delegations

Signing into Monet

To sign into Monet go to: wfmlive.com

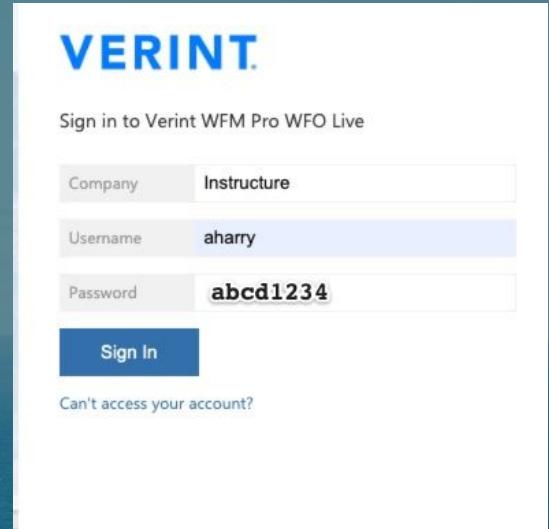
Here will be your initial login

Company: **Instructure**

Username: **first initial last name (e.g. jdoe)**

Password: **abcd1234**

You will be required to change password on first login. Outside of training, please reach out to your supervisor for any questions you may have in regards to Monet.



The image shows a screenshot of a web-based login interface for Verint WFM Pro WFO Live. At the top, the Verint logo is displayed in blue. Below it, the text "Sign in to Verint WFM Pro WFO Live" is visible. The form contains three input fields: "Company" with the value "Instructure", "Username" with the value "aharry", and "Password" with the value "abcd1234". A blue "Sign In" button is located below the password field. At the bottom of the form, there is a link "Can't access your account?".

Monet Website

The next few slides we will be going over how to navigate the relevant tabs in Monet as well as requesting time off and overtime.

PTO = Paid Time Off

UTO = Unpaid Time Off

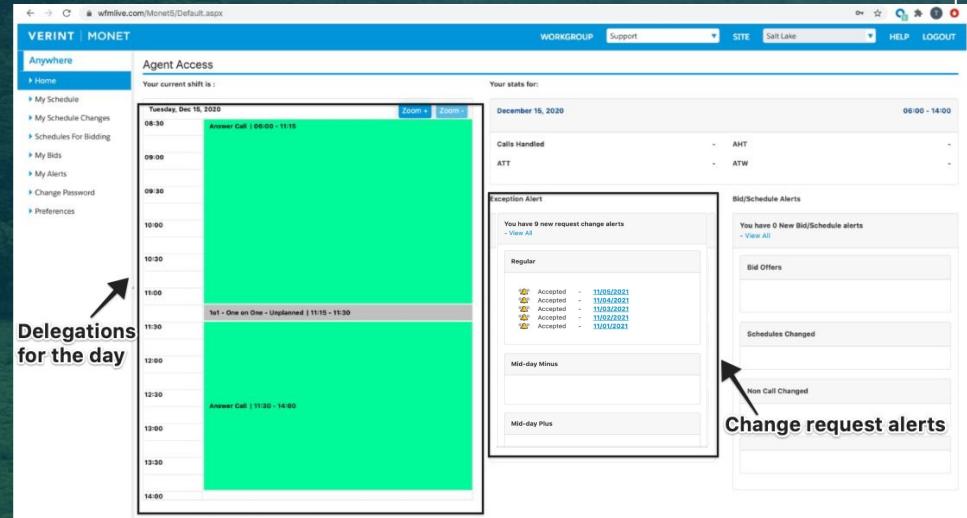
MOT = Mandatory Over Time

VTO = Voluntary Time Off

Home

The home page will quickly display what your delegations are for the day (answer call, chat, or email)

- Here you will see any new request change alerts (if your time off was approved).
- You can also update your Monet password here.



My Schedule

This is where you will request time off or request mandatory overtime hours. You will also have a quick view of your schedule via calendar.

Below “Bulk schedule change request/View” select the ‘From’ date with the calendar picker and then select the ‘To’ date with the calendar picker. Then select ‘Request Change’.

Calendar:
Blue = Schedule Published
Red = Accepted Time Off Requests

The screenshot shows the 'Agent Access' interface of the VERINT MONET system. On the left, there's a sidebar with links for Home, My Schedule, My Schedule Changes, Schedules For Bidding, My Bids, My Alerts, Change Password, and Preferences. The main content area has a title 'Interactive Schedule Calendar' for December 2020. A blue box highlights the date 16th. Below the calendar is a 'Bulk schedule change request/View' form with 'From' and 'To' fields both set to '12/15/2020', and a 'Request Change' button. A legend at the bottom defines colors: green for Today, red for Exception, and blue for Schedule released by supervisor. To the right, there's a 'Personal Hours Pools' section with tabs for PERSONAL HOURS POOL, USED, PLANNED, and REMAINING. An arrow points from the text 'Your PTO' to this section.

My Schedule ~ PTO/UTO

Select Exception: The first drop down you will select ‘Paid Time Off’ or ‘Unpaid Time Off’ (if you are PT). The second drop down you will select ‘Regular’. This will be for full days off.

Select Supervisor - Tony Garat (You will ALWAYS select Tony). Do NOT select your own supervisor.

Date and **To Date** - Confirm the dates selected before are correct. You can adjust the dates from here if needed.

Time Off Hours - The amount of time your are taking off for the day.

Personal Hour Cost - The amount of PTO you are using for the day.

Notes - Add any necessary notes in regards to your request.

Select Exception:	Paid Time Off	Regular
Select Supervisor:	Garat Tony	
Date:	08/01/2022	
To Date	08/05/2022	
Time Off Hours	8	
Personal Hour Cost	8	

Please note; that if you are requesting one day off or multiple days off at a time, regardless, the **Time Off Hours** and **Personal Hour Cost** will be the amount of time you are requesting **PER DAY**, not for the whole period. (i.e. if you work 8 hours a day and you're taking one week off, you will enter “8” in this field)

My Schedule ~ Mid-day (-)

Select Exception: First drop down select ‘Paid Time Off’ or ‘Unpaid Time Off’. Second drop down select Mid-day (-). This will be for partial work days, for example: if you have an appointment.

Impact: Choose ‘-’

Select Supervisor - Tony Garat (You will **ALWAYS** select Tony). Do **NOT** select your own supervisor.

Date and To Date: Select the ‘From’ date and then select the ‘To’ date.

Start / End: Choose the start and end time you will be gone during your shift for the day. It is in the format of Hr:Mins. (ie: if your shift ends at 4pm and you need to leave at 2pm, you would put 14:00 for the Start and 16:00 for the End.)

Time Off Hours - The amount of time your are taking off during your shift.

Personal Hour Cost - The amount of PTO you are using for the time requested off.

Notes - Add any necessary notes in regards to your request.

Working (Y/N): You will put ‘No’ here if you are not working.

Select Exception:

Paid Time Off

Mid-day

Impact

-

Select Supervisor:

Tony Garat

Date:

07/21/2022

To Date

07/21/2022

Start:

14 : 00 (Hr:Mins)

End:

16 : 00 (Hr:Mins)

Time Off Hours

2

Personal Hour Cost

2

Working (Y/N):

No

My Schedule ~ MOT, Mid-day (+)

Select Exception: First drop down select ‘Mandatory OT’. Second drop down select Mid-day.

Impact: Choose ‘+’

Select Supervisor - Tony Garat (You will **ALWAYS** select Tony). Do **NOT** select your own supervisor.

Date and **To Date**: Select the ‘From’ date and then select the ‘To’ date for the days you will be adding hours to your schedule.

Hours: Choose the amount of hours you are requesting to add to each day. (ie: if you are adding 1 hour to your shift for each day, you will input 1:00)

Before/After: Choose if you are adding the hours before or after your shift.

Select Exception: Mandatory OT Mid-day

Impact +

Select Supervisor: Tony Garat

Date: 09/01/2022

To Date 09/01/2022

Hours: 1 : 00

Before/After: After

My Schedule Changes

Here is where you will go to view your schedule changes.

To view your schedule changes (such as time off that you submitted):

- 1.** Select My Schedule changes from the left navigation menu
- 2.** Filter the results as desired:
 - a.** Requested By: Select the filter from the pull down menu
 - b.** Exception Code: Select the filter from the pull down menu
 - c.** Event Date: Select the filter from the pull down menu
 - d.** Exception Type: Select the filter from the pull down menu
 - e.** Request Partner: Select the filter from the pull down menu
 - f.** Status: Select the filter from the pull down menu
- 3.** Select Apply Filter

Select the magnifying glass icon in the Action column to view the request details. If your request was declined, there will always be a comment in the request details.

My Schedule Adherence

Agents can view their schedule adherence performance through Monet as well.

To view your Schedule Adherence:

1. Select My Schedule adherence from the left navigation menu
2. Select From and To dates in the calendar
3. Select View
4. You can see your percent in adherence per day, and the average percentage in adherence for the date range you selected.

NOTES:

- The Selection range is limited to one week or less
- If the adherence percentage ever looks incorrect, feel free to reach out to your supervisor.

My Schedule Changes

wfmlive.com/Monet5/Default.aspx

VERINT | MONET

Anywhere

- Home
- My Schedule
- My Schedule Changes**
- Schedules For Bidding
- My Bids
- My Alerts
- Change Password
- Preferences

Agent Access

Requested By: ALL Exception Code: ALL Event Date: ALL Status: ALL

Exception Type: ALL Request Partner: ALL

Apply Filter Clear Filter

Schedule change requests

REQUESTED ON	REQUESTED BY	EXCEPTION TYPE	EXCEPTION DATE	EXCEPTION CODE	SUPERVISOR	EXCEPTION TIME	STATUS	ACTION
12/15/2020 09:37	Agent	Midday(-)	12/15/2020	Paid Time Off	Williams Brenna..	13:00-14:00	Pending	<input type="checkbox"/>

<< Previous 1 Next >>

Exceptions per page: 30

Legend: View Edit Delete

Back to Home Hide Accept Decline

wfmlive.com/Monet5/Default.aspx

VERINT | MONET

Anywhere

- Home
- My Schedule
- My Schedule Changes
- My Schedule Adherence**
- Schedules For Bidding
- My Bids
- My Alerts
- Change Password
- Preferences

Agent Access

My Schedule Adherence View

From: 12/13/2020 To: 12/15/2020 View

Average Percentage In Adherence For Range: 33.89%

Adherence Score by Date

DATE	SCHEDULED MINUTES	OCCURRENCES OUT OF ADHERENCE	TIME OUT OF ADHERENCE	PERCENT IN ADHERENCE	DETAILS
12/14/2020	480.00	4	03:50:53	51.90%	
12/15/2020	255.00	1	04:15:00	0.00%	

<< Previous 1 Next >>

My Schedule Adherence

Monet in Salesforce

Agents can access a quick view of their schedule and adherence in Salesforce. In the following slides we will be going over Monet in Salesforce.

Accessing Monet in Salesforce

1. On the bottom panel of salesforce, click “Monet”
2. You can view what delegation you’re scheduled, and what status you’re in
3. This will tell you if Monet is recognizing you as in adherence, and what your adherence score for the day is.

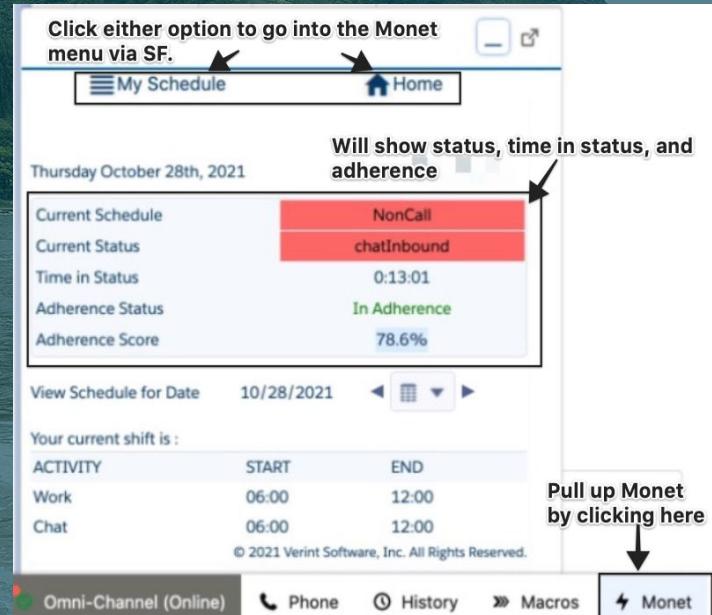
You'll have two options at the top, 'Home' and 'Schedule'. Clicking either option will take you to the same page, it will just determine which tab opens up on the page.

Green = Answer Tasks (Phones)

Red = Chats

Blue = Queues (Emails)

Grey = Exception (ie: VTO, PTO, Etc)



Monet in Salesforce (continued...)

There are a few tabs across the top that we will focus on. These tabs are similar to what we covered on the Monet website.

Home - Will show your delegation for the day, provide a calendar view of your schedule, and you can view your adherence.

My Schedule - Shows you a view of your schedule for the week.

My schedule Changes - Shows you a list of your schedule requests, whether they have been approved or not.

My Adherence - You can input a start/end date to view your adherence.

My Alerts - Will show a list of past alerts.

Monet in Salesforce ~ Reminder Alerts

Reminder alerts will pop up in Salesforce automatically and can help agents by reminding them when it's time to switch statuses; such as changing delegations, going on lunch, and when it's your EOD.

Agents can view the alert and close them.

