



Event Types – Structure & Management

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About this document

This document accompanies the CommunityWFM College webinar *Event Types – Structure and Management*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.



Event Types – Structure and Management

Let's talk about event types and their settings! In this session we will look at the different event types, event priorities, and event behaviors and how they can help you manage your schedules.

We will take an in-depth look at the behavior questions and what they mean.

What are Event Priorities, Event Types, and Event Behaviors?

These are the three characteristics of an event: a priority, a type, and a behavior.

When setting up your CommunityWFM, we assigned colors, determined event priorities, then identified and built the events, giving each event a priority level, then set event behaviors.

Event priorities

Event priorities determine how events are layered on a schedule. Work is typically the lowest priority, meaning it is the base and all other events are on top of it in order of importance. Think of it as a block of Legos. Looking at a stack of Legos from the side you can see them all, but if you view it from above, all you see are the Legos on the top layer – the ones with the highest priority.

If you want people to be in a meeting and disregard their break, the meeting would be higher priority. Out of office is usually the second highest priority, and lunch is usually the highest priority, because it's unpaid. If PTO is on a schedule, it goes above breaks, meetings, work, training, and lunch goes on top of that so when you run a report on PTO, you'll only see the amount of PTO taken and not the unpaid lunch.

A typical set of priorities might look like this:

- 1 – Default Work type: *Lowest Priority*
- 25 - Secondary Work
- 100 – Breaks
- 200 – Meetings and Trainings
- 300 – Off site such as vacation, jury duty, unplanned sick, etc.
- 900 – Lunch (*unpaid*)



Creating Event Priorities	
Event priorities determine how events layer on a schedule.	1. Go to Settings > Application settings > Event type settings > Event priorities.
	2. Review the existing/default priorities. Determine which require edits and what additional priorities are needed for your center.
	3. Select <i>Click here to create a new event priority</i> .
	4. Assign a priority number. This must be a unique number between 1 and 999. Here's a recommendation for a numbering scheme. This format allows the addition of new events in between if you add events with different priorities later. <ul style="list-style-type: none"> • 1 – Default Work type: <i>Lowest Priority</i> • 25 - Secondary Work • 100 – Breaks • 200 – Meetings and Trainings • 300 – Off site (e.g., vacation, jury duty, unplanned sick, etc.) • 900 – Lunch (unpaid)
	5. Give it a <i>Friendly name</i> (required description).
	6. Click <i>Save</i> .

Event types

Event types are the name, color, priorities, paid status, and shrinkage type you assign to an event. You want names to be descriptive and specific so everyone will know what the event is when they see it on a schedule. Break, lunch, team meeting, PTO are common event types. These are the building blocks of schedules and include the exceptions you put onto schedules (late, sick, etc.). Event types allow you to group events for reporting.



Pro-tip: If an event is being used in a schedule, you can't delete it.

Pro-tip: There is a new option in 5.0 to designate the shrinkage type for each event. If you plan to use events from the published schedules to create shrinkage profiles, you need to designate those properties here. It's up to each company to determine whether an event's shrinkage should be discretionary, non-discretionary, or neither (not shrinkage). For forecasting, you just need to know the total shrinkage to plan for; for reporting, you want the details.

<h2>Building Event Types</h2>	
<h3>Adding colors</h3>	
<p>A color scheme allows you to customize your event types and schedules. Colors also allow for quick identification of the types of events in reports.</p>	
<p>Add colors to your palette.</p>	<ol style="list-style-type: none"> 1. Go to Settings > Application settings > Color palette.
<p>To search for specific color HTML codes: https://www.w3schools.com/colors/colors_names.asp</p>	<ol style="list-style-type: none"> 2. Select <i>Click here to create a new color.</i> 3. From the color picker, click on a color and the HTML code will populate, or you can enter a code in the HTML Code box. The pound sign/hashtag (#) is required when entering a code.
	<ol style="list-style-type: none"> 4. Add a name for this color. 5. Click <i>Save</i>.
<p>You cannot delete the default color palette; however, you can edit the colors and names. Click on the color name or HTML code to open the color picker window and make the edits.</p>	
<h3>Adding events</h3>	
<ul style="list-style-type: none"> • There is a new <i>Shrinkage Type</i> field in 5.0. If you plan to use events from the published schedules to create shrinkage profiles, you need to designate the shrinkage properties here. • This is where you set up the Event Reminder memos, which sends a reminder before an event starts and/or before an event ends. 	



Add event type.	<ol style="list-style-type: none"> 1. Navigate to Settings > Application settings > Event type settings > Event types.
	<ol style="list-style-type: none"> 2. Select <i>Click here to create a new event type</i>. <ul style="list-style-type: none"> • Name: Add a descriptive name (required). • Description is optional. • Display color: Select from the drop-down. The options include all colors in your palette. More than one event can have the same color. We recommend that like type events be assigned the same color. • Event priority: Select from the previously created list. • Pay status: Paid or unpaid. This is for reporting purposes – it’s not connected to any outside systems like payroll. • Minimum role authorized to select this from lists: For most leave as “everyone.” There are other places in the event type behaviors where you can restrict access. • Shrinkage type: Select whether the event represents discretionary shrinkage, non-discretionary shrinkage, or does not represent any type of shrinkage. • Click <i>Save</i> then continue to the Steps-to-Success.
Set a default start and end time (optional). Typically used for PTO.	Click <i>Basic properties</i> in the Steps-to-Success. At the bottom there is a now checkbox to set the start and end time of the event. This will determine where it is added to a schedule. For example, you can set the start time for vacation/PTO as 8:00 am so anyone with a full day of vacation time will have it show on the schedule starting at that time.

Event behaviors

Event behaviors describe how the event interacts with the system. The event behaviors determine whether the event occurs at work, the agent is in queue, requires supervisor approval, etc.



A specific set of questions with yes/no answers determines how the system uses the event, and whether the agent can request it.

Configuring Event Type Behaviors	
Define the event behavior for reporting, adherence, and other system functions.	<ol style="list-style-type: none"> 1. Click <i>Configure event type behaviors</i> in the Steps-to-Success.
	<ol style="list-style-type: none"> 2. Select a predefined event type classification. This will pre-select the options on the <i>Custom behavior settings</i> tab.
	<ol style="list-style-type: none"> 3. Fine-tune the behaviors on the <i>Custom behavior settings</i> tab, including whether the event requires supervisor approval. (See Appendix – Event type presets).
Eight questions allow you to customize event behaviors in Community.	
<ol style="list-style-type: none"> 1. Can this event type be used as a default work type? 	This setting determines if events of this type can be used as an agent’s default work type, used as a work type in schedule template definitions, or can be used in the ASAP types that add scheduled work intervals (such as overtime). Events of this type are used to validate the placement of events marked as “Constrained by Work Event” (Question 3). Typically paired with On Site (Question 2) and In Queue (Question 4).
<ol style="list-style-type: none"> 2. Does this event occur at work / on site? 	This setting determines if events of this type occur at the physical location of the contact center/agent. Typically paired with <i>Default work type</i> (Question 1).
<ol style="list-style-type: none"> 3. Is this event type's start time and duration constrained by an agent work type event? 	This setting determines if events of this type can have a start time / end time that is for any time, or is it required to have an underlying “work type” event (an event whose type answers YES to Question 1) underneath (in the layered view). These are usually breaks, lunches, or other intraday events that don’t make sense to have outside of a work shift. If a person is scheduled to work from 8:00 AM – 5:00 PM, we don’t want breaks or lunches scheduled at 7:30 PM. If the event type answers YES to this question, there must be an underlying work type for the entire duration of the constrained event.



4. Is the scheduled agent logged into a queue during events of this type?	This setting determines if agents are included in the “scheduled” headcount for net-line (over/under) reports. If the agent is scheduled in an event type that answers YES to this question, then that person is included; otherwise, they are skipped. Typically breaks, lunches, intraday events, meetings, etc. will answer NO to this question so they are not counted in the over/under calculations (e.g., when comparing “scheduled” to “forecasted” headcount).
5. Does this event type require supervisor approval?	This setting determines if the event must be APPROVED before it shows up in the schedule. These would include PTO, other time off, leave, etc. These are usually paired with Out of Queue (Question 4 is NO) and Not at Work (Question 2 is NO). This is the definition of the event types that are presented to users when they make “time off” requests. (Not In Queue, Not at Work, Requires Supervisor Approval).
6. Are agents available for callback into queue during events of this type?	This setting determines whether the agent can be called back into the queue if they’re scheduled in this type of event. If things are busy in the contact center and the meeting can be interrupted, the supervisor can go fetch the agents out of the meeting and get them back on the phones.
7. Do events of this type travel with agent schedule swaps?	This setting is used for swap / trade transactions and determines if events of this type stay with the original scheduled agent or “move” as part of a schedule transaction. If two agents swap schedules, only the TRADE = YES events swap between them; if they had anything on the schedule that was marked as TRADE = NO, then those events remain with the original agent.
8. For real-time adherence, should agents be considered logged into queue during events of this type?	This is used for adherence calculations / reconciliation. If an agent was late (e.g., through the check-in monitor), we would expect “At work” (Question 2) to be NO, “In Queue” (Question 4) to be NO, and “Supervisor Approval” (Question 5) to be NO. But, if we put an event on the schedule that is marked as “Out of Queue” (Question 4 is NO), then it would appear that the agent is “In adherence” (because the schedule says not in queue and the phone state says not in queue, thus “in adherence”). That’s not how we want to report that kind of time; for the purposes of



HEADCOUNT (over/under reports) the person should NOT be counted, but for adherence, that time should be considered “In queue” because the agent should have been in queue but wasn’t. So, we support a hybrid view of events related to adherence / headcount to allow the adherence reports to reflect out of adherence but also to not count that agent as in queue during the period.

Creating event reminders

- Best practice is to create reminders only for events that will occur while a person is at work (e.g., breaks and lunches) and not away from work (e.g., on vacation).
- Agents must have Community open to receive event reminders, and the correct date and time defined on their workstation.
- Changes made to reminders will only affect future events. Reminders are inserted into the reminder feed when newly published events are added to a schedule or when an existing published event is modified. Agents will not receive reminders for events in their existing published schedules unless you modify the affected events, **after** you create the reminder.

Establish reminder time frames for the beginning and/or end of events of this type.

1. In the Event reminder panel click *Set up event reminders*.
 2. Click *New*.
 3. **Reminder length:** Enter the reminder length in minutes from 1–90.
 4. **Reminder type:** Select *Before event start* or *Before event end*. For example, you may want to remind an agent that their break starts in 10 minutes, then another reminder at 5 minutes before. You can create multiple reminders for each event.
 5. **Description** (required): Enter a description for the reminder.
 6. Click *Save*.
- Add additional reminders for before the start and/or end of the event.



Extras for Event Types	
Security	Not typically used.
People assigned to this work type	Not typically used.
Reviewing Reports	
There are two reports that are most helpful when reviewing events: The <i>Published event summary report</i> and the <i>Shrinkage report</i> .	
Published event summary report	This report shows the total number of hours of shrinkage (discretionary and non-discretionary), paid and unpaid hours, in queue/out of queue hours, and estimated cost of events. There are many options for filtering and slicing/dicing the data in this report.
	<ol style="list-style-type: none"> 1. Go to Report > Published schedule > Published event summary > [select level].
	<ol style="list-style-type: none"> 2. In the options panel, select the activity level and dates.
	<ol style="list-style-type: none"> 3. If desired, use the <i>Event type filters</i> to limit the report to events that occur off site (not at work), not in queue, and/or require supervisor approval.
Shrinkage report	<ol style="list-style-type: none"> 4. After making all selections, click <i>Apply</i>.
	This report is limited to the events designated as discretionary or non-discretionary shrinkage in the set-up of the event.
	<ol style="list-style-type: none"> 1. Go to Report > Published schedule > Shrinkage report.
	<ol style="list-style-type: none"> 2. In the options panel, select the activity level and dates.
	<ol style="list-style-type: none"> 3. Click <i>Apply options</i>.
	<ol style="list-style-type: none"> 4. Use the filters at the top of the report to change the views.



Appendix – Event type presets

The logical use of each event type dictates the event type classifications presets. You can adjust the presets as needed to customize the event behaviors.

Work Time Event (In Queue)

- Default Work Type (Question 1) = YES
- At Work (Question 2) = YES
- In Queue (Question 4) = YES
- Travel with Agent (Question 7) = YES
- In Queue for real-time adherence (Question 8) = YES
- The other questions are NO

Break & Lunch Event

- At Work (Question 2) = YES
- Constrained by Work (Question 3) = YES
- Available for Callback (Question 6) = YES
- Travel with Agent (Question 7) = YES
- The other questions are NO

Intraday Exception Event

- In queue for real-time adherence (Question 8) = YES
- The other questions are NO. This may seem confusing but if an agent is “late” then that person isn’t at work, not in queue, not available for callback, supervisors can’t really approve a “late.”)

Meeting / Training Event

- At Work (Question 2) = YES
- Available for Callback (Question 6) = YES
- Travel with Agent (Question 7) = YES
- The other questions are NO

Pre-planned Time Off Event

- Requires Supervisor Approval (Question 5) = YES
- The other questions are NO (Remember from above, the definition of a time off event is At Work = NO, In Queue = NO, Requires Supervisor Approval = YES)