



Special Calendar Events

Webinar handout

Version: August 17, 2023



Community**WFM**

phone 877-668-6870
web CommunityWFM.com

3400 Waterview Parkway, Suite 325
Richardson, Texas 75080



Table of Contents

About this document.....	2
What is the purpose of special calendar events?.....	2
*What’s the difference between special calendar events and special calendar days ?.....	3
When would you use special calendar events?	3
When would you use a special calendar day?.....	3
Creating a special calendar event.....	3
Step 1: Basic Properties.....	3
Automatic collection point integration	5
Step 2: Associate Activities.....	5
Step 3: Create instances of the Special Event.....	6
Deleting a special calendar event.....	8
Special calendar events with advanced vacation.....	9
Creating a special calendar day.....	9
Deleting a special calendar day.....	11
Creating a forecast profile from special days.....	11



About this document

This document accompanies the CommunityWFM College webinar *Special Calendar Events*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

What is the purpose of special calendar events?

Special calendar events/days allow you to designate times when there is a change in your call volume/AHT that you want to consider when forecasting, and a way to indicate when the center is closed.

There are three functions of special calendar events.

1. A way to note when things have occurred that affect your contact volume or AHT (or both) that you can reference later.
For example, you're getting ready to create a forecast for a week with a marketing campaign. You want to find the last five times that a campaign occurred and because you noted it in the calendar as a special calendar event, the system will seek out and find the last five occurrences of that campaign and use those weeks to create the forecast. This process uses the *Static Profile from Special Days* data source type in your forecast profile (selected in Step 2 when creating a forecast profile).
2. A way to create special calendar **days***.
For example, if there was a power outage that interrupted your operations. You can create a special day manually for one-off events that occur on one day or in one activity/the whole center, however, if you create a special calendar day within a special calendar event, it can apply to multiple days, and reference multiple data sources. For example, if you only want Site 1 to have this special day, you can select "apply this special calendar event to Site 1," and it will find all collection points assigned to Site 1 throughout the EM tree and create the special day for it.
If creating a special calendar day outside of a special calendar event, it's all activities or one; if creating a special day within a special calendar event, you can select one or many or all data sources. See [Creating a special calendar day](#).
3. A way to indicate when the center is closed.
You can designate that the center or activity is closed on the special day. Then when



creating a working schedule that includes that date, there is a message letting you know that the center is closed on a day in that week so you can adjust for it.

*What's the difference between special calendar **events** and special calendar **days**?

A special calendar **day** can stand alone but can only reference one or all data sources on a single day. A special calendar **event** can reference one, or many, or all data sources and can apply to more than one day.

When would you use special calendar events?

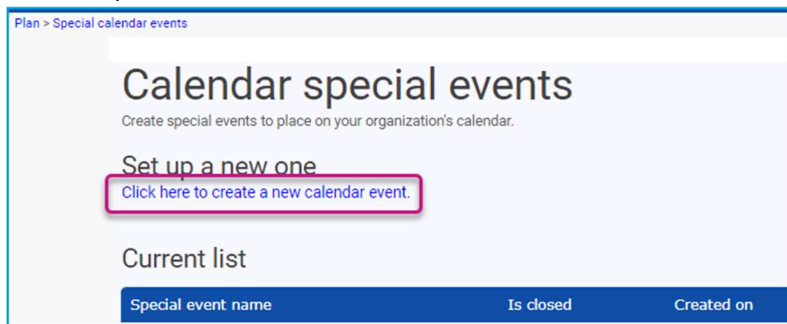
- When your center is closed on the same date every year (Christmas / July 4).
- When you have campaigns occurring on a periodic schedule.

When would you use a special calendar day?

- When some event affected the CV or AHT on a day (e.g., a power outage at one location for four hours).

Creating a special calendar event

Plan > Special calendar events



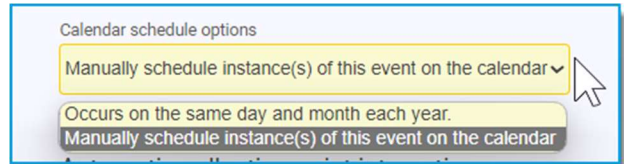
Step 1: Basic Properties

Calendar event name / notes: Add a name and description.

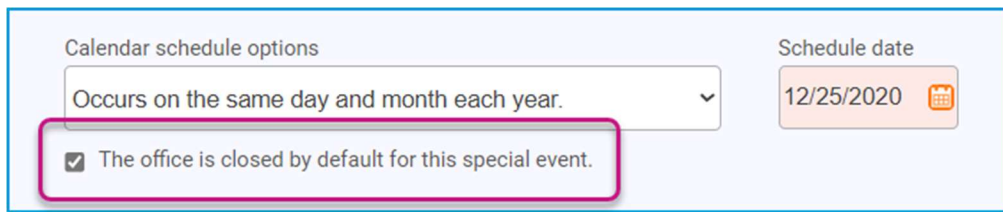


Calendar schedule options: From the dropdown select whether the event occurs on the same date every year (e.g., Christmas) or you will manually schedule.

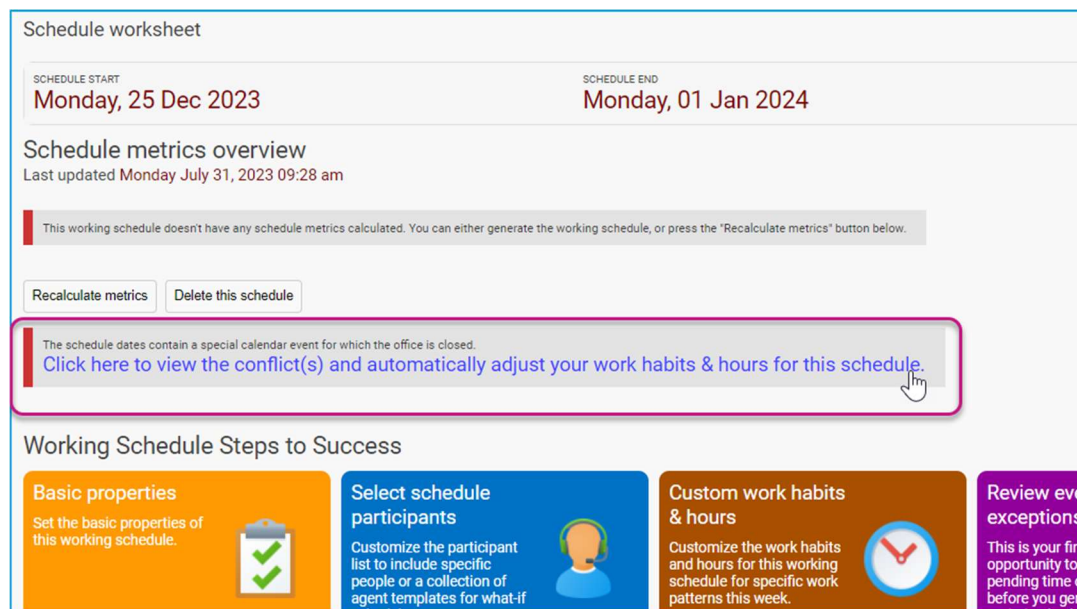
- Occurs on the same day and month each year:** Select the day in the calendar picker. Use this option when creating a single special calendar day or when the date is the same each year (e.g., Christmas, New Years).
- Manually schedule instance(s) of this event on the calendar:** Use this option when selecting multiple days or when the day is on a different date each year (e.g., Thanksgiving, Labor Day). You'll select the days in Step 3.



The office is closed by default for this special event: Check the box if the contact center is closed on this date or leave unchecked if it is open. If checked, the calendar will indicate that the center is closed.



When creating a working schedule that includes a special calendar day with this box checked, there is a message notifying you that the center is closed that day.





Clicking the link in the message opens a pop-up where you can adjust the work habits for that day.

Special calendar day conflicts

The following calendar special events occur during this schedule week.

Schedule fit	Required hours	Scheduled hours
Christmas	Monday	Cotharin, Todd

If the center is closed, you would **not** include the next checkbox *Automatically include special days in data collection*.

Automatic collection point integration

Automatically include special days in data collection: Check the box to include special day(s) in data collection, or leave unchecked to exclude the day(s) in data collection. Including the special day will create a data collection "exception" for all collection points associated with activities that are included in the special day definition. This means that when generating contact volume forecasts, it will automatically exclude those dates in the forecast.

Automatic collection point integration

Check the box below to automatically create collection point special days for any activity linked to one or more collection points. If you do not want to create special days, make sure the box is cleared before you apply to these activities.

Automatically include special days in data collection.

Step 2: Associate Activities

Select the appropriate activities for this event. This allows you to include or exclude activities for the event. E.g., some departments are closed for a holiday, but other groups must work to cover for emergencies.

Click *Apply to activities*.

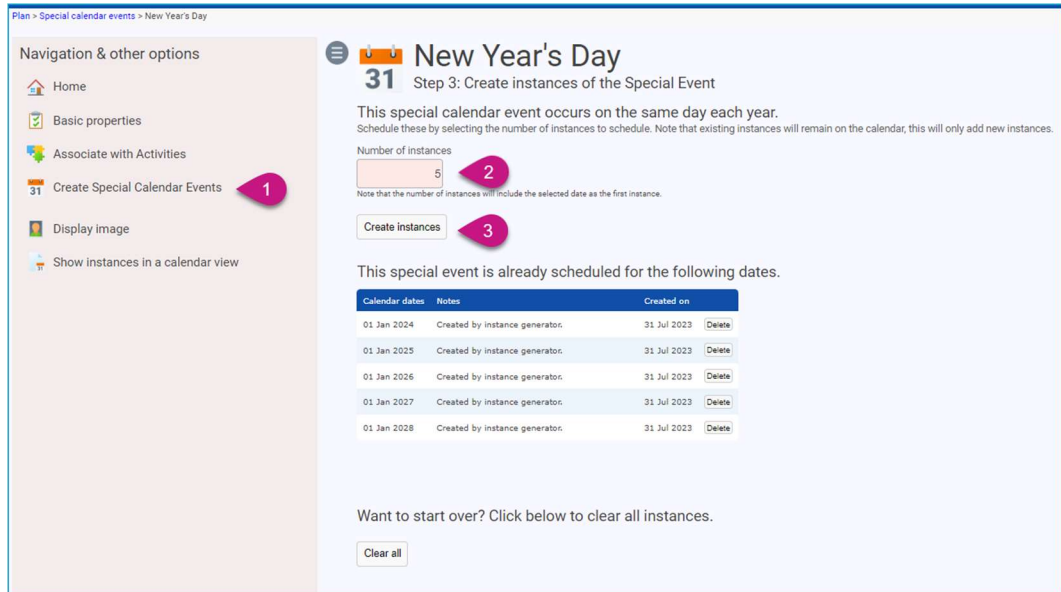


Step 3: Create instances of the Special Event

1. Select *Create Special Calendar Events* in the navigation pane.

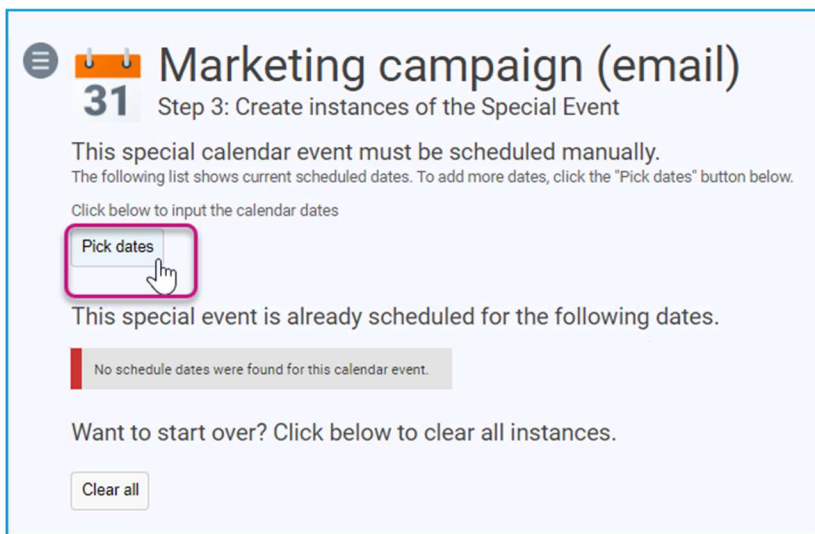
If **Occurs on the same day and month each year**

2. **Number of instances:** How many years do you want to create?
3. Click *Create instances*.



If **Manually schedule instance(s) of this event on the calendar:**

- Click *Pick dates* to open a calendar in a pop-up window.





- Go through the calendar and click to select all applicable dates for this event. When finished, click *Create instances*. When creating a forecast using special calendar days, the system will select the week with that date.

Marketing campaign (email)
Click on a date in the calendar to create special day instances.

May 2022 - October 2022

May 2022							June 2022							July 2022							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2	3	4	5	6	7	1	2	3	4										1	2
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	
29	30	31	26	27	28	29	30	24	25	26	27	28	29	30							
														31							

August 2022							September 2022							October 2022									
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
1	2	3	4	5	6						1	2	3							1			
7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8			
14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15			
21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22			
28	29	30	31	25	26	27	28	29	30	23	24	25	26	27	28	29							
														30	31								

Create instances

- View the list of selected dates. If necessary, you may delete individual dates, or click *Clear all* to start over.

Marketing campaign (email)
Step 3: Create instances of the Special Event

This special calendar event must be scheduled manually.
The following list shows current scheduled dates. To add more dates, click the "Pick dates" button below.

Click below to input the calendar dates

Pick dates

This special event is already scheduled for the following dates.

Calendar dates	Notes	Created on
20 Jun 2022	Manually created	31 Jul 2023 Delete
18 Jul 2022	Manually created	31 Jul 2023 Delete
15 Aug 2022	Manually created	31 Jul 2023 Delete
19 Sep 2022	Manually created	31 Jul 2023 Delete
17 Oct 2022	Manually created	31 Jul 2023 Delete

Want to start over? Click below to clear all instances.

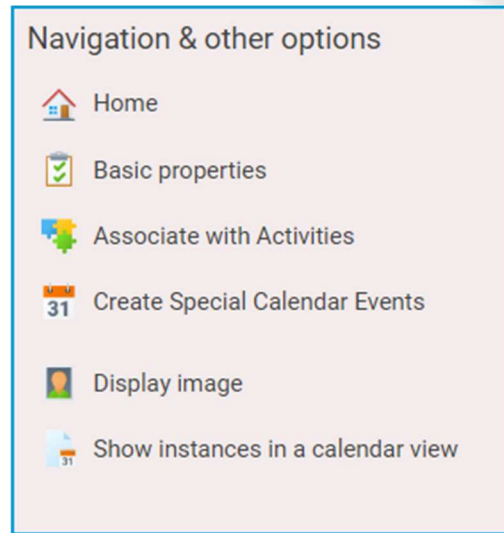
Clear all



Display image

If desired, click *Display image* in the navigation pane then upload a file that will display on the calendar.

Show instances in a calendar view: Allows you to view scheduled days in calendar format.



Deleting a special calendar event

If you uncheck the box to *Automatically include special days in data collection* for a previously created special calendar event, when deleting the event you have the option to keep or remove future data collection points.

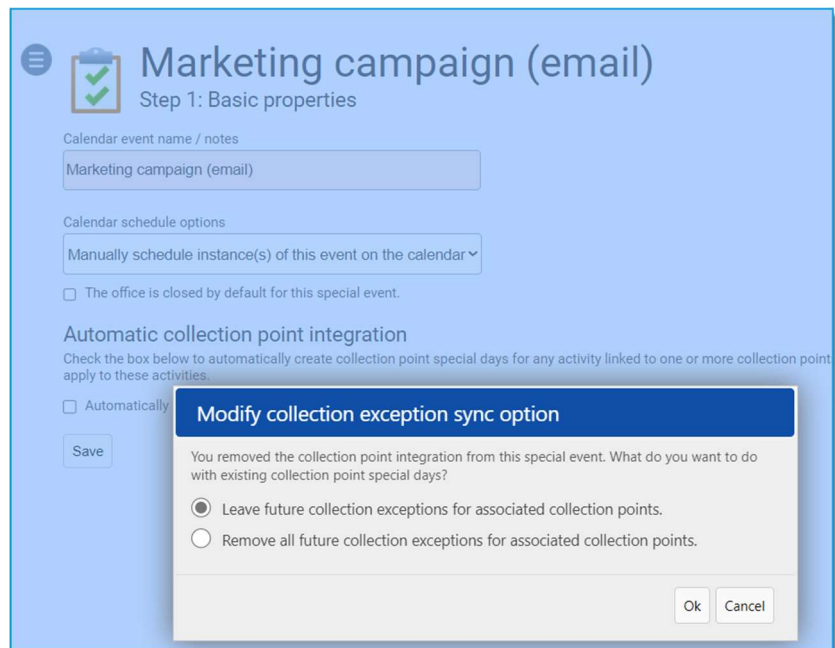
Navigate to Plan > Special calendar events.

In the *Current list*, locate your event then click *Delete*.

Select how you want to delete the event:

Leave existing data collection special days in place: This option will leave existing special days in the calendar but will not create any new days.

Remove existing data collection special days for future dates. This option will remove existing future special days in the calendar.





Special calendar events with advanced vacation

When creating a calendar partition, verify that you have configured any special calendar events (e.g., holidays when the contact center is closed) prior to creating the calendar partition rules. These events can then be applied in the rules of the calendar partitions. You can't create events directly in the calendar partition rules, so complete these before setting up the partitions.

Creating a special calendar day

Navigate to Settings > Data sources and select your data source.

Select *Show the setup options dialog* in the Setup options tile.



Select *Collection Points*.

The screenshot shows the 'Setup options' dialog box. It has a blue header and a light gray body. The 'Collection Points' section is highlighted with a red border. The sections are: 'Basic Properties' (with a checkmark icon), 'Connections' (with a link icon), 'Collection Points' (with a stack of papers icon), 'Device States' (with a phone icon), and 'Security' (with a lock icon). A 'Cancel' button is at the bottom right.



For the activity, select *Add/remove special days*.

Configure collection points

Id	Device id	Friendly name	Description	Active?	
39	Billing	Billing	Billing	<input checked="" type="checkbox"/>	
2	Developer support	Developer support	Developer support	<input checked="" type="checkbox"/>	

At the bottom of the pop-up window, select *New special day*.

Billing
Contact volume special days

Sunday, 25 Dec 2022	Christmas
Monday, 25 Dec 2023	Christmas

Select the date for the special day, provide a description, and indicate whether the day should apply to all collection points or only this collection point.

Click *Save*.

Special day properties

Special day 7/27/2023

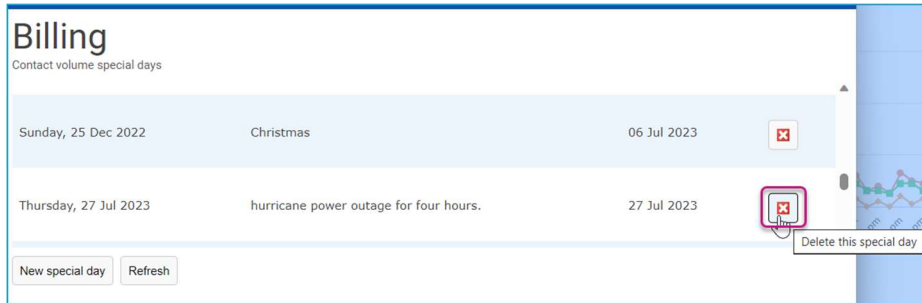
Description

Apply to all collection points?



Deleting a special calendar day

Navigate to the list of special days and click the red X. You cannot **edit** a special day here.



Creating a forecast profile from special days

Create a forecast profile based on the special event using *Static Profile from Special Days* and select the special event. You can indicate how many instances of the past special event to include.

STEP-BY-STEP

Forecast > Forecast profiles

1. Select *Click here to create a new forecast profile*.

Step 1: Basic properties

2. Give it a name. Description is optional.
3. *Use this profile for quick forecasting?* Typically, *No* since this reflects days that are special and not routine.
4. *This profile will contain what type of data?* Select *Contact volume*, *Service targets*, *Shrinkage percentage*, or *Staffing requirements*.
5. Click *Next*.

Step 2: Select data source type

6. Click *Select* in the *Static Profile from Special Days* row.

Step 3: Define forecast profile collection parameters

7. Select from the *Choose your special event* dropdown.
8. Enter the number of past weeks with the special day to include. The default is 4.
When creating a forecast, the system will go back and find this number of instances of the special calendar event to include in the forecast.



9. Volume import option: Select whether to import all intervals in the special event date range selected or only those with collected volume.
10. Click *Finish*