



Event Settings

Customizing Behaviors & Presets

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About this document

This document reviews the eight questions available for customizing events, and how the answers effect event behavior. It also reviews the five presets available for events.

Event settings — customizing behavior

Ten questions allow you to customize Event behaviors in Community.

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 definition, 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).

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. Typically paired with "Default work type" (Question 1).

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 who's 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 (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 if the agent can be called back into the queue if they’re scheduled in this type of event. If things are going poorly 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, typically with intraday exceptions such as "sick" or "late". 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; it should actually be that 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.

9. Is this event type available for agent selection in the Agent Self-Service Kiosk?

For ASSK events this is hard coded as Yes. For other predefined event types this is hard coded as NO. When Yes, the item will appear in the list of eligible items when an agent is making a self-service event request.

10. If eligible for Agent Self-Service Kiosk, does this require runtime validation?

For ASSK events, if YES the validation engine will check the request against the rules established in the validation plan. If NO, the self-service request will be placed on the agent's schedule without checking any rules.



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, though some are hard-coded due to the nature of the predefined event.

Agent Self-Service Request

- Default work type (Question 1) = NO
- At Work (Question 2) = YES
- Constrained by Work (Question 3) = YES
- Requires Supervisor Approval (Question 5) = NO
- Available for agent self selection (Question 9) = 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 RTA (Question 8) = YES
- The other questions are NO. This may seem a little confusing but if an agent is "Late" then it that person isn't at work, not in queue, not available for callback, supervisors can't really approve a "late", etc.)

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)



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 RTA (Question 8) = YES
- The other questions are NO