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Genesys Engage On-Premises Use Cases

Genesys Schedule-based Routing (EE04) for Genesys Engage on premises

5/11/2026

Important

PS material for this use case has not been finalized. Please contact your local CSD for effort estimates and scope details of this use case.

Enable schedule-based routing

What's the challenge?

Ensuring that employees adhere to their schedules is a headache for contact center leaders. When staff are late taking breaks or starting different scheduled work, it impacts your service levels, your sales revenues and your costs.

What's the solution?

Routing interactions based on your workforce management schedules and staff skills can help ensure a better balanced workload for employees and improved schedule adherence.

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Use Case Overview

Story and Business Context

Enrich any of the existing use cases handling inbound interactions with the ability to route calls based on WFM schedules. Doing so can help ensure a more-balanced multi-skill workload for agents and improvement in schedule adherence. Routing strategies can route based on the anticipated availability of an agent. For example, interactions are not routed to agents immediately before they are scheduled for a break or a meeting. This improves agent adherence and leads to better customer service and worker efficiency.

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

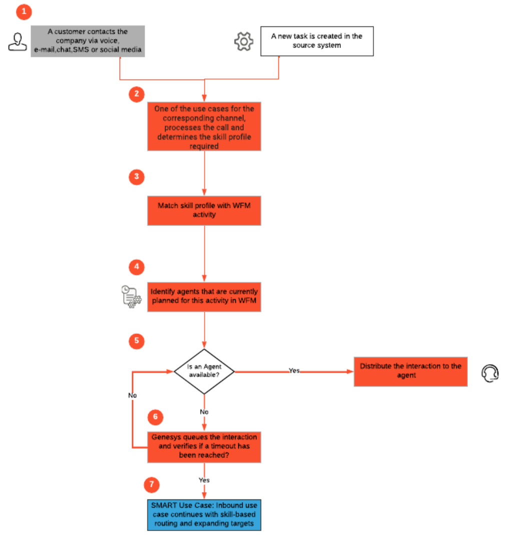
Use Case Benefits	Explanation
Improved Employee Utilization	Enable accurate omnichannel forecasting and scheduling based on skills and schedules through the automated use of historical information and channel specific algorithms and schedule based routing
Reduced Employee Attrition	Regard agent schedules including break times and shift end through schedule-based routing
Reduced Handle Time	Allow for more accurate and timely routing to the best agent through optimized scheduling with intelligent routing
Reduced Overtime Costs	Improve schedule adherence and regard end of shift times through schedule based routing

Summary

Schedule-based routing is a powerful tool enabling contact centers to optimize employee satisfaction while reduce attrition and unnecessary overtime all while providing better coverage.

Use Case Definition

Business Flow


1
A customer contacts the company via voice, e-mail,chat,SMS or social media
A new task is created in the source system
2
One of the use cases for the corresponding channel, processes the call and determines the skill profile required
3
Match skill profile with WFM activity
4
Identify agents that are currently planned for this activity in WFM
5
Is an Agent available?
Yes
Distribute the interaction to the agent
No
No
6
Genesys queues the interaction and verifies if a timeout has been reached?
Yes
7
SMART Use Case: Inbound use case continues with skill-based routing and expanding targets

Business Flow Description

1. The customer contacts the company by one of the following channels:
    1. Voice
    2. E-mail
    3. SMS
    4. Social
        - *Alternatively, a new task may be created by a 3rd party source system for distribution by the Genesys system
2. One of the use cases for the corresponding channel, processes the call and determines the skill profile required to handle the interaction.
3. The skill profile is matched with the corresponding activity in WFM
4. Genesys will identify the agents, which are currently scheduled to work on this activity. Cut off times will be taken into account, i.e. an agent shortly before his break will not receive an interaction which usually has a long average handling time.
5. Genesys will check if one of these agents is available. If yes, it will distribute the interaction to this agent
6. If no, Genesys will queue the call until one of these agents becomes available or a time out is reached
7. If the time out is reached, the distribution logic will continue with skill-based routing and subsequent target expansions as defined in the underlying use case.

Business and Distribution Logic

Business Logic

BL1: Activity

It must be possible to match the possible routing targets of the underlying use case (skill expressions) to an activity in WFM. This activity will be used to identify the agent's schedules.

BL2: Scheduled agents and cut off time

Genesys scans schedules and activities stored in the WFM database periodically (every 15 minutes). This information will be used in Genesys routing decisions. Note that an agent could be working on multiple activities at any given time.

The routing cutoff time is the period that URS stops sending interactions to an agent for the activity when the schedule for a specific activity is about to end. This cutoff time should reflect the duration of a typical interaction and a threshold that an agent can allow an interaction to overlap into the time of the next scheduled activity. For example, if the typical interaction lasts 3 minutes and the threshold is 2 minutes, cutoff time might be the difference between them or 1 minute. URS would no longer send interactions specific to that activity to a particular agent when only 1 minute remains for the agent to spend doing that activity. Cut off times will be configurable by activity.

BL3: Timeout to wait for a scheduled agent

This timeout will be configurable by activity.

Distribution Logic

Full distribution requirements will be included in the underlying use case. The distribution requirement specific for this use case are described in the previous chapters.

User Interface & Reporting

Agent UI

No additional agent desktop requirements.

Reporting

Real-time Reporting

No additional real-time reporting requirements.

Historical Reporting

Reporting requirements in addition to the reporting functionality of the underlying use cases: - Number of Interactions which were distributed according to schedule - Number of Interactions overflowing back to skill based routing

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	• **Digital** • Genesys Email Routing (CE16) • Genesys Social Media Routing (CE19) • Genesys SMS Routing (CE29) **Inbound** • Genesys Call Routing (CE01) • Genesys Personalized Routing	None	None

All of the following required:	At least one of the following required:	Optional	Exceptions
	(CE02) **Workforce Engagement** • Genesys Workforce Scheduling for Voice (EE01) • Genesys Omnichannel Workforce Scheduling (EE02)		

General Assumptions

- Workforce Management base service (WFM Use Case or Genesys WFM product) already deployed is a pre-requisite.
- Depending on the channels which should be covered with this use case, Inbound or Digital Use Cases is required.
- This use case currently does not support chat as this is not included in the available WFM use cases.
- Use case is not compatible with the functional use case “predictive matching”.

Document Version

- Version **v 1.0.2** last updated **May 11, 2026**