Genesys Engage On-Premises Use Cases

Genesys Employee Schedule Preferences (EE10-A) for Genesys Engage on premises

2/11/2026

> **Important**
>
> The WFM product also supports PureConnect in this use case.

Empower employees with self-administration of their schedule

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and want to easily self-manage their schedules. Managers want to reduce the time it takes to manage this process as long as the contact center runs efficiently.

What's the solution?

Give employees the control they want. The right web application empowers employees to self-manage their schedules through business rules. Employees can request time off, submit schedule preferences, and manage exceptions — without going through a supervisor or planner.

Other offerings:

PureConnect

Contents

Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment through automated time-off processing, featuring:

- Time-off balance is automatically calculated and recalculated when supervisors or agents update time-off.
- The time-off balance for each agent is automatically calculated at the beginning of every time-off year and when the date associated to a time-off rule is reached.
- Control of the number of agents on time off in the time-off limits.
- Time-off tracking to support shrinkage calculations applied to the staffing forecasts.This use case provides the following business benefits:

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 Satisfaction	Empower employees through the ability to self-manage time-off requests against predetermined business operational rules
Reduced Administration Costs	Reduce operational planning time by decreasing the effort of approving and managing time-off requests

Summary

Employees can self-manage their time off, controlled through business rules.

Use Case Definition

Business Flow

(1) Supervisor flow

The following diagrams show the business flow of the use case.

Configuration and Supervisor Flow

Agent Flow

Schedule Preferences Self Management
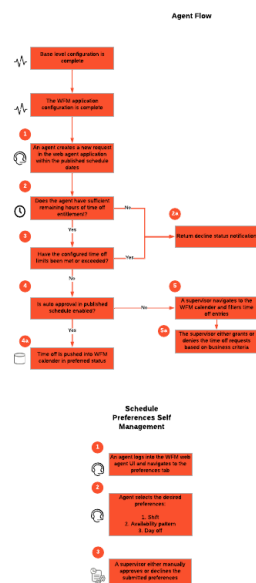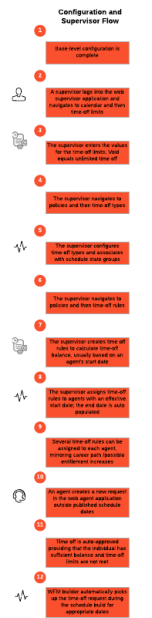
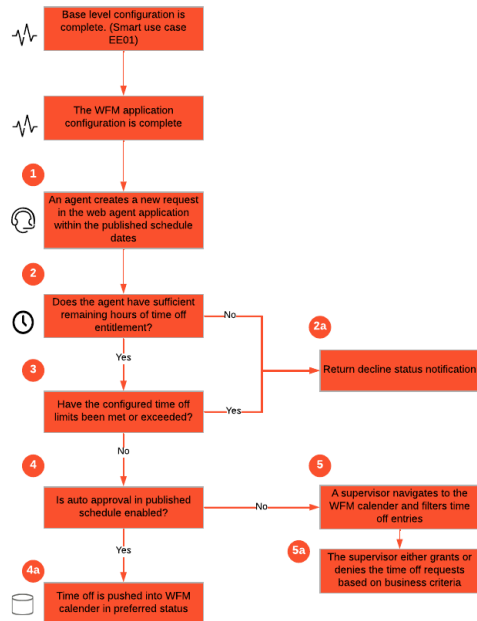**Business Flow Description** Supervisor Flow

1. Base configuration complete (Use Case EE01).

2. Supervisor logs into Web Supervisor application and navigates to Calendar > Time Off Limits.

3. Supervisor enters values for Time Off Limits (void = unlimited).

4. Supervisor navigates to Policies > Time Off Types.

5. Supervisor configures Time Off Types and associates with Schedule State Groups.

6. Supervisor navigates to Policies > Time Off Rules.

7. Supervisor creates Time Off Rules to calculate time-off balance (usually based on agent's contract).

8. Supervisor assigns Time Off Rules to agents with an effective start date (end date is populated automatically by the system).

9. Several Time Off Rules can be assigned to each agent, mirroring their career path and possible increased entitlement.

10. Agent creates new request in Web Agent application outside of published schedule dates.

11. Time off is automatically granted, providing that the agent has enough hours remaining and the Time Off Limits have not been met.

12. WFM Builder automatically picks up the time-off request during the schedule build for the appropriate dates.

Business Flow

(2) Agent flow

Agent Flow

Base level configuration is complete. (Smart use case EE01)

The WFM application configuration is complete

1 An agent creates a new request in the web agent application within the published schedule dates

2 Does the agent have sufficient remaining hours of time off entitlement?

No → **2a** Return decline status notification

Yes

3 Have the configured time off limits been met or exceeded?

Yes →

No

4 Is auto approval in published schedule enabled?

No → **5** A supervisor navigates to the WFM calender and filters time off entries

Yes

5a The supervisor either grants or denies the time off requests based on business criteria

4a Time off is pushed into WFM calender in preferred status

Business Flow Description Agent Flow

1. Agent creates a new request in the Web Agent application within the published schedule dates.

2. Settings previously configured in WFM Application Options determine whether the time-off request is automatically processed in the published schedule.

3. Time off is pushed to WFM Calendar in Preferred status, providing that the agent has enough hours remaining and the Time Off Limits have not been met.

4. If auto-approval in published schedule is not enabled, supervisor navigates to WFM Calendar and filters on Time Off entries.

5. Supervisor grants/declines time-off requests based on business criteria.

Business and Distribution Logic

Business Logic

Time-off rules, limits, and configuration is specific to the customer, vertical, region, and country laws, and so can vary widely. However, the base requirements are:

- Time-Off Limit Values
- Time-Off Types
- Application of Time-Off Rules to Time-Off Types
- Enabling of time-off self-management

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Agents access the WFM Web Agent UI with a supported browser. There is no Java in this UI. See Supported Operating Environment Guide for specific browser support.

Reporting

Real-time Reporting

N/A

Historical Reporting

The Genesys Workforce Management product contains a number of out-of-the-box historical reporting elements. Details can be found in the Workforce Management Administrator Guide.

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	**Workforce Engagement** • Genesys Workforce Scheduling for Voice (EE01) • Genesys Omnichannel Workforce Scheduling (EE02) • Genesys Back-office Scheduling (EE26)	None	None

General Assumptions

Assumptions for PureConnect customers running Genesys Workforce Management

PureConnect Platform Assumptions:

The dependency use case covers the PureConnect Platform-specific assumptions. Please be advised that Genesys Back office Scheduling (EE26) is currently not a dependency for this use case for PureConnect. The prerequisites for this use case on PureConnect are Genesys Workforce Management for Voice (EE01) and Genesys Omnichannel Workforce Scheduling (EE02)

  • PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

Other Assumptions

The customer has the requirement or desire to use this element of advanced WFM. The Inbound Voice use case is a pre-requisite of the base WFM package, including the definition of Queues, Stats, Agents & Skills. Because the WFM Web Supervisor uses Java, both JRE and Tomcat are requirements. See Supported Operating Environment Guide for specific versions.

Customer Responsibilities

Schedule State Groups are configured to meet business requirements regarding Time-Off Types.

Document Version

- Version **v 1.2.3** last updated **February 12, 2026**