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Genesys Engage On-Premises Use Cases

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

Important

This use case also supports PureConnect as the WFM product is supported to run on both platforms.

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

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Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment through enabling employees to request and drive their own shift exceptions, optimizing both employee satisfaction and business operational needs. The use case features:

- The ability for an agent to enter an exception into the published schedule.
- Labor-saving as agents enter exceptions that would otherwise be entered by supervisors.
- Agent empowerment, allowing agents to enter items into their own schedules.
- Supervisor control, as customers can decide whether the agent-initiated exception is pushed directly to the master schedule or if it requires supervisor approval prior to appearing in the schedule.

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 | Allow employees to have more say in their schedule |
| Improved Employee Utilization | Eliminate the need for the planner to process these requests |
| Reduced Administration Costs | Allow business users to specify the types of exceptions that be requested from employees |

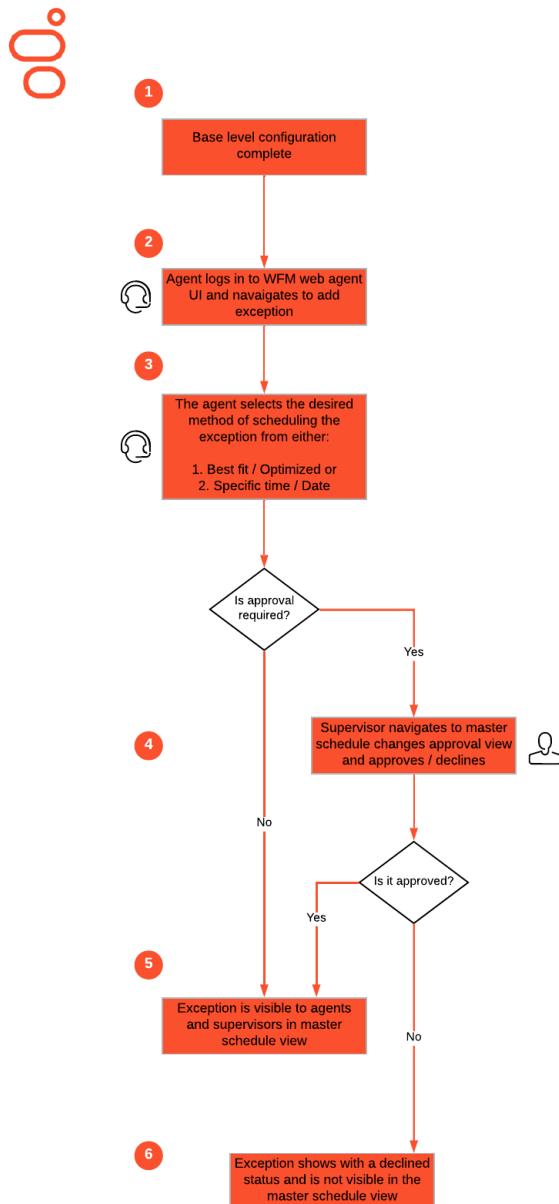
Summary

Deliver the capability for an employee to enter exceptions (offline activities) into their schedule via the Workforce Management User Interface without the need to supervision or effort on the planner's behalf.

Use Case Definition

Business Flow

The following diagram shows the business flow of the use case:



Business Flow Description

1. Base configuration complete (use case EE01, EE02, or EE26).
2. In Web Agent application, user navigates to Add Exception.
3. Agent selects how she wants to schedule the exception:
 - Best fit/optimized
 - Specific time/date
4. If supervisor approval is required, the supervisor navigates to Master Schedule Changes Approval view and approves/declines the agent-initiated exception.
5. Exception is visible to agents and supervisors in the master schedule.
6. If the supervisor declines the request it appears as declined in the master schedule view.

Business and Distribution Logic

Business Logic

The following business capabilities need to be in place to allow this capability to be of benefit:

- Defined rules and decisions on which exceptions employees can use.
- Confirmation from the business on the operating procedures of such exceptions.

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 <ul style="list-style-type: none">• 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:

Supervisor has a user role allowing access to Exceptions. In Web Supervisor application > Policies > Exception Types:

- check 'Agent-Initiated' to enable the functionality

- enter optional start/end dates if required
- PureConnect GWFM Connector is required to utilize Genesys WFM on PureConnect

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) Additional assumptions which are included in the dependency use cases cover the PureConnect Platform-specific assumptions.

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

This use case should be considered only if the business intends to allow agents to have a say in how their schedules get built.

Document Version

- Version **v 1.1.3** last updated **February 3, 2026**