GENESYS™

Genesys Engage On-Premises Use Cases

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

2/24/2026

> **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

Contents

Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment by enabling employee shift preferences and optimizing both employee satisfaction and business operational needs. The Workforce Management schedule builder can optionally consider agent preferences for individual days when building schedules. Agents can enter preferences for shifts, days off, availability, and time off using WFM Web for Agents. Supervisors can enter agent preferences in Workforce Management Web for Supervisors and, with the appropriate security permissions, can grant or reject preferences. If a supervisor grants a preference, the calendar algorithm considers that agent's preference when building the schedule, along with various other criteria such as seniority.

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:

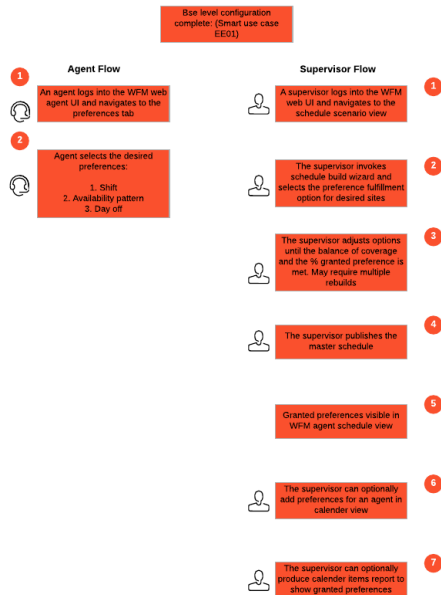| Use Case Benefits	Explanation
Improved Employee Satisfaction	Empower employees through the ability to self-manage their preference requests against pre-determined business operational rules
Reduced Administration Costs	Reduce operational planning time by a decrease in effort to approve and manage preference requests

Summary

Deliver the capability for an employee to self-manage their schedule preference requirements within the Workforce Management product, controlled through business rules.

Use Case Definition

Business Flow

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

Bse level configuration complete: (Smart use case EE01)

Agent Flow

1. An agent logs into the WFM web agent UI and navigates to the preferences tab

2. Agent selects the desired preferences:
   1. Shift
   2. Availability pattern
   3. Day off

Supervisor Flow

1. A supervisor logs into the WFM web UI and navigates to the schedule scenario view

2. The supervisor invokes schedule build wizard and selects the preference fulfillment option for desired sites

3. The supervisor adjusts options until the balance of coverage and the % granted preference is met. May require multiple rebuilds

4. The supervisor publishes the master schedule

5. Granted preferences visible in WFM agent schedule view

6. The supervisor can optionally add preferences for an agent in calender view

7. The supervisor can optionally produce calender items report to show granted preferences

Business Flow Description AGENT

1. Agent logs into WFM Web Agent UI and navigates to the Preferences tab.

2. Agent selects desired preferences:
   - Shift
   - Availability Pattern
   - Day Off

SUPERVISOR

1. Supervisor logs into the WFM Web Supervisor UI and navigates to the Schedule Scenario view.

2. Supervisor invokes the Schedule Build Wizard and selects the Preference Fulfillment option for the desired site(s).

3. Supervisor adjusts preference fulfillment options until the desired balance between coverage and percentage of granted preferences is met (might require multiple rebuilds).

4. Supervisor publishes the master schedule.

5. Granted preferences visible in WFM Web Agent Schedule view.

6. Supervisor can optionally add preferences for an agent in the Calendar view.

7. Optionally, Supervisors can produce the Calendar Items Report to show granted preferences.

Business and Distribution Logic

Business Logic

The ability to set preferences relies on the underlying contract and shift configuration configured for each business unit, site, team, and employee.

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

- WFM Application settings are detailed in the functional design document.

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

Consider configuring shift names that have meaning to agents so they are clear on what they are selecting.

Document Version

- Version **v 1.1.3** last updated **February 25, 2026**