Genesys Engage On-Premises Use Cases

Genesys Shift Bidding (EE11) for Genesys Engage on premises

9/11/2025

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

Empower employees to influence their schedules

What's the challenge?

As millennials make up more of your workforce, they want more control in their lives and a way to easily influence 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?

Supervisors manage specific employees who can choose shifts or schedule they want while managing the operation of the contact center.

Other offerings:

 PureConnect

Contents

Use Case Overview

Story and Business Context

This use case focuses on operational efficiency and employee empowerment through enabling the employee shift bidding process. In this process, planners build employee profiles rather than individual employee schedules. Once schedules are created, the employees are asked to populate their individual profiles with their preferred shift combinations.

Contrary to the use of rotating patterns and agent shift preferences, Workforce Management Schedule Bidding allows supervisors to build schedules based on the best coverage available within the pre-defined business rules, constraints, and labor laws. The supervisor controls which agents can bid on schedules and the dates available for bidding, allowing for complete operational control.

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:

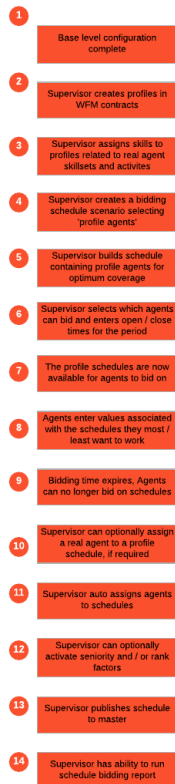| Use Case Benefits	Explanation
Improved Employee Satisfaction	Empower employees by allowing them to self-manage their schedules against pre-determined profiles that correspond with their contractual and shift obligations. Allow employees to select profile schedules based on their personal preferences
Reduced Administration Costs	Allow workforce planners to build employee profiles based on operational requirements to assist with overall scheduling needs. Reduce operational planning time by decreasing effort associated with approval and management of schedule requests
Reduced Penalties and Fines	Generate ideal schedules whilst adhering to business rules and labor laws

Summary

Provides the capability for workforce planning teams to generate schedules based on profiles of their configured employees. Once generated, these profiles can be pushed to the employee for preference selection.

Use Case Definition

Business Flow

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

1 Base level configuration complete

2 Supervisor creates profiles in WFM contracts

3 Supervisor assigns skills to profiles related to real agent skillsets and activites

4 Supervisor creates a bidding schedule scenario selecting 'profile agents'

5 Supervisor builds schedule containing profile agents for optimum coverage

6 Supervisor selects which agents can bid and enters open / close times for the period

7 The profile schedules are now available for agents to bid on

8 Agents enter values associated with the schedules they most / least want to work

9 Bidding time expires, Agents can no longer bid on schedules

10 Supervisor can optionally assign a real agent to a profile schedule, if required

11 Supervisor auto assigns agents to schedules

12 Supervisor can optionally activate seniority and / or rank factors

13 Supervisor publishes schedule to master

14 Supervisor has ability to run schedule bidding report

Business Flow Description

1. Base Configuration Complete (Use Case EE01).

2. Supervisor creates Profiles in the WFM Contracts.

3. Supervisor assigns skills to the profiles related to real agent skill sets/WFM activities.

4. Supervisor creates a Bidding schedule scenario selecting Profile Agents.

5. Supervisor builds schedule containing Profile Agents for optimum coverage.

6. Supervisor selects which agents can bid on the schedule and enters open/close times for the Bidding period.

7. The Profile Schedules are now available for agents to bid on.

8. Agents enter values associated with the schedules they most / least want to work.

9. The Bidding time expires, and agents can no longer bid on schedules.

10. Supervisor can optionally assign a real agent to a profile schedule.

11. Supervisor auto-assigns agents to schedules.

12. Supervisor can optionally activate Seniority and/or Rank.

13. Supervisor publishes Schedule to Master.

14. Supervisor can run Schedule Bidding Report.

Business and Distribution Logic

Business Logic

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

Bidding is available for one-week schedules, allowing agents to select a group of shifts over a given period.

The supervisor user role has the following access:

- WFM Policies > Contracts > Profiles
- WFM Configuration > Agents > Activities & Skills
- WFM Schedules > full access

Contract Profiles are created with the appropriate skill assigned to provide optimum coverage and relation to real agents.

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.

- WFM Application settings enabled for Bidding: WFM Web > AgentBidding\AllowAccess=true.

- Supervisor builds profile schedules.

- Agents enter bids using Web Agent application.

- Supervisor controls the bidding process using seniority, rank, or both.

Customer Responsibilities

Base WFM configuration completed for skills and profiles.

Document Version

- Version **v 1.1.3** last updated **September 11, 2025**