GENESYS™

Genesys Engage On-Premises Use Cases

Genesys Training and Activity Scheduling (EE12) for Genesys Engage on premises

2/24/2026

> ## Important
>
> The benefits highlighted in this use case are typically tracked and measured by processes and systems outside of the Genesys solution. While our customers have realized benefits in these areas by using our solution, the measurements are not part of the standard offering of this use case.

Manage training, coaching and offline activities scheduling across the workforce

What's the challenge?

Scheduling agents for online versus offline tasks requires a delicate balance and coordination with back-end resources. While you want your agents to be servicing customers, you also want to provide them with appropriate training and coaching. When these processes are disparate, it makes scheduling challenging.

What's the solution?

Optimize and automate your scheduling process. Break away from manual spreadsheets and ease supervisor burdens by integrating offline tasks. Use operational insights on your agent competency to target effective training. Empower and trust agents to manage their individual schedules while reducing costs.

Contents

Use Case Overview

Story and Business Context

Optimizing offline scheduling tasks allows a business to streamline operational processes between departments such as resource planning/forecasting, training, and contact center operations. Scheduling offline tasks is typically a very manual process occupying up to 30% of organizational Manpower planning and training resources.

Scheduling offline activities such as meetings, training, and coaching, can often be a time-consuming and disparate process. Consequently, scheduling teams have to juggle the optimum time for each session based on the business requirements and targets with room, manager and trainer availability. Due to the different business areas and systems involved, many in-house spreadsheets are developed to help record, track, and communicate the progress of the activities, all adding time and complexity to the process.

Training Manager helps remove these challenges, promoting a more collaborative working practice while managing the end-to-end process as a single entity. Managers and trainers can request and schedule their own ad-hoc meetings and training via the Training Manager Web Portal.

Through integrations with Workforce Management and Exchange, Training Manager can show:

- The best time to schedule an activity for business and agent availability.
- When managers and trainers are available
- When rooms are available

This integration allows for the creation of an optimized schedule for activities in minutes. Once finalized, the schedule can automatically be pushed to the following systems:

- WFM
    - Update agent, manager, and trainer schedules and work exceptions
- Exchange
    - Update room calendars
- Training Manager Portal
    - Update agent, manager, and trainer calendars
    - Create training attendance registers
- Email
    - Send participants and facilitators notification and calendar invites to their scheduled sessions

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	Improve speed to competency through scheduled targeted training interventions set against Performance DNA results or by skill level; also limits training shrinkage. Improve visibility of training completion status through the Operational Dashboard to deliver improved training completion
Reduced Administration Costs	Improve offline scheduling enables tasks between resource planning, training, and operations all to be done in minutes, not days or even hours. This in turn delivers operational efficiency with a reduction or reallocation of resources of approximately 30%. Improve management of room bookings through Outlook integration reduces scheduling and planning by optimizing the end-to-end training process. Improve scheduling of team meetings and one-on-one meetings between supervisors and employees. Empower managers to schedule their own meetings through the portal (within set parameters) means less workload for resource planners

Summary

Deliver a set of capabilities to workforce planners that allow them to plan and execute offline scheduling of activities in the most efficient & effective manner.

Use Case Definition

Business Flow

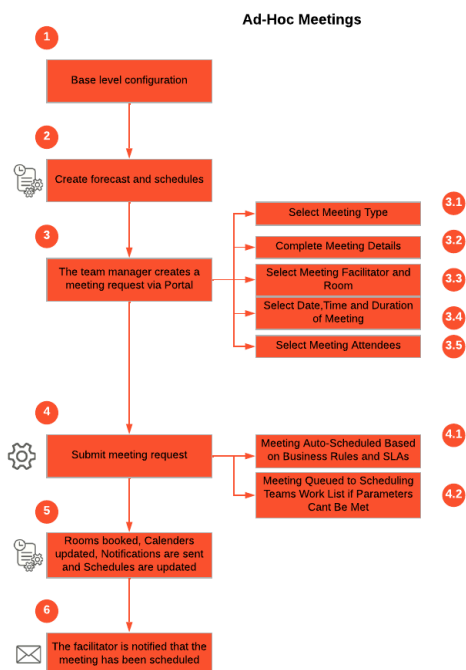**(1)** The following diagrams show the business flow of the use case.

The business flow described below requires the base configuration of Training Manager and WFM to be completed by Genesys Professional Services with future schedule and forecast data built and Training Manager configuration.

Business Flow

(2) Recurring Meetings

Business Flow

(3) Training Requests

Ad-Hoc Meetings

```
1
  Base level configuration

2
  Create forecast and schedules

3                                    3.1  Select Meeting Type
  The team manager creates a         3.2  Complete Meeting Details
  meeting request via Portal         3.3  Select Meeting Facilitator and
                                          Room
                                     3.4  Select Date,Time and Duration
                                          of Meeting
                                     3.5  Select Meeting Attendees

4                                    4.1  Meeting Auto-Scheduled Based
  Submit meeting request                  on Business Rules and SLAs
                                     4.2  Meeting Queued to Scheduling
                                          Teams Work List if Parameters
                                          Cant Be Met
5
  Rooms booked, Calenders
  updated, Notifications are sent
  and Schedules are updated

6
  The facilitator is notified that the
  meeting has been scheduled
```
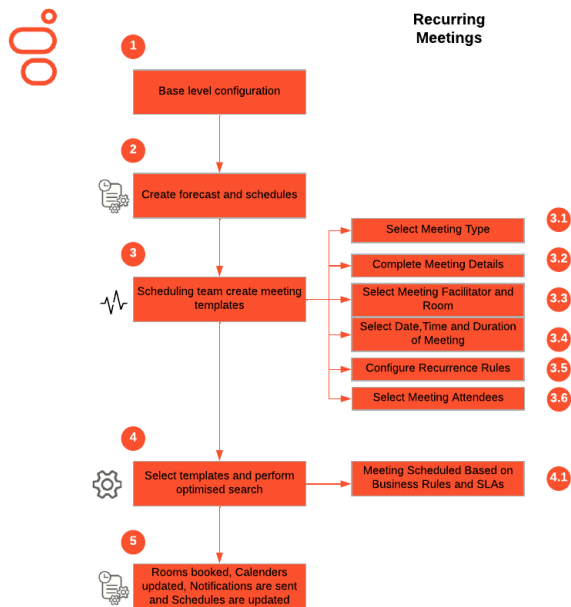
Business Flow Description Ad-hoc meetings

1. Scheduler builds the Training Manager environment:
   - Defines Meeting Types.
   - Defines Locations and Rooms.
   - Optimizes Search parameters.
   - Maps Parameters to Meeting Types.
   - Enables auto-scheduling of requests.

2. Scheduler verifies that there is a current / future forecast and schedule.

3. Team Manager creates meeting request via the web portal:
   - Selects Meeting Type.
   - Specifies date range and times of day.
   - Selects the Manager to facilitate the meeting.
   - Selects the Location where the meeting should take place.
   - Selects the Attendees for the meeting based on the WFM hierarchy.

4. Submits the Meeting to the Automated queue.

The queued request is processed on a first-come-first-served basis and automatically triggers the search algorithm, which:

1.
   - Collects staffing Requirements, Staffing Levels, Agent Availability, and Manager Availability from WFM.
   - Collects Room Availability from Exchange.
   - Schedules the meeting(s) at an optimized time to suit the business, Manager, and Attendees.
   - Adds failed requests to a work queue for a Scheduler to review manually.

2. Automated processes:
   - Write Work Exceptions to WFM.

Recurring Meetings

1. Base level configuration
2. Create forecast and schedules
3. Scheduling team create meeting templates
   - 3.1 Select Meeting Type
   - 3.2 Complete Meeting Details
   - 3.3 Select Meeting Facilitator and Room
   - 3.4 Select Date,Time and Duration of Meeting
   - 3.5 Configure Recurrence Rules
   - 3.6 Select Meeting Attendees
4. Select templates and perform optimised search
   - 4.1 Meeting Scheduled Based on Business Rules and SLAs
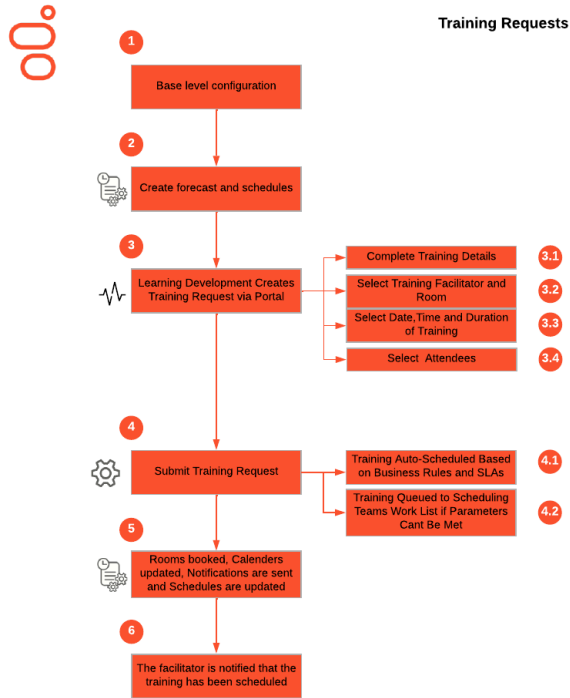5. Rooms booked, Calenders updated, Notifications are sent and Schedules are updated

For

- Create room bookings in Exchange calendars.
- Email the facilitating Manager and Attendees with the details of the meeting.
- Update product Manager and Agent calendars.
- Notify the person making the request of its progress.

Business Flow Description Recurring Meetings

1. Scheduler builds the Training Manager environment:
   - Defines Meeting Types.
   - Defines Locations and Rooms.
   - Optimizes Search parameters.
   - Maps Parameters to Meeting Types.
   - Enables auto-scheduling of requests.
2. Scheduler verifies that there is a current / future forecast and schedule.
3. Scheduler creates the Meeting Template:
   - Selects Meeting Type.
   - Specifies date range and times of day.
   - Selects the Manager to facilitate the meeting.
   - Selects the Location where the meeting should take place.
   - Configures recurrence rules.
     - Daily / Weekly / Monthly recurrence
     - Recurrence frequency, every X days, weeks, months
     - Minimum number of days between meetings, to prevent monthly one-to-one meetings happening in the same week, such as the 30th of one month and the 4th of the next.
   - Selects the Attendees for the meeting based on the WFM hierarchy.

each schedule run / creation, update the date range

and run a new optimized search. The user is notified of any team changes that have taken place since the last meeting was scheduled.

Training Requests

4. Scheduler selects the meeting and runs an Optimized Search. The search algorithm:

   - Collects staffing requirements, staffing levels, agent availability and manager availability from WFM.

   - Collects room availability from Exchange.

   - Schedules the meetings at an optimized time to suit the business, manager, and attendees.

   - Adds failed requests to a work queue for a scheduler to review manually.

5. Automated processes:

   - Write Work Exceptions to WFM.

   - Create room bookings in Exchange calendars.

   - Email the facilitating manager and attendees with the details of the meeting.

6. Updates appear in the manager and agent calendars.

Business Flow Description Training Requests

1. Scheduler builds the Training Manager environment:

   - Defines Meeting Types.

   - Defines Locations and Rooms.

   - Optimizes Search parameters.

   - Maps Parameters to Meeting Types.

   - Enables auto-scheduling of requests.

2. Scheduler verifies that there is a current / future forecast and schedule.

3. Learning and Development creates a Training Template:

   - Selects a Training Type.

   - Specifies date range and times of day.

   - Selects the Trainer to facilitate the Training.

- Selects the Location where the Training should take place.

- Select the Attendees for the Training based on the WFM hierarchy.

4. Submit the training to the automated queue.

The queued request is processed on a first-come-first-served basis and automatically triggers the search algorithm, which:

1.
   - Collects staffing requirements, staffing levels, agent availability and manager availability from WFM.

   - Collects room availability from Exchange.

   - Schedules the training at an optimized time to suit the business, manager, and attendees.

   - Adds failed requests to a work queue for a scheduler to review manually.

2. Automated processes:

   - Write Work Exceptions to WFM.

   - Create room bookings in Exchange calendars.

   - Email the facilitating Trainer and Attendees with the details of the Training.

   - Update in product Trainer and Agent calendars.

   - Notify the person making the request of its progress.

When used in conjunction with Performance DNA the Learning and Development team can target specific agent learning or levels of learning based on:

- Performance trends across the organization.

- Individual performance trends.

- Results from previous training / learning / coaching sessions.

- WFM skill.

- Correlation analysis: other agents that

performed well in a specific training went on to improve in a skill. For example, agents that performed well in the "understanding customer needs" training went on to improve their NPS score.

Business and Distribution Logic

Business Logic

The business user needs to predefine, in the underlying workforce management system, the offline activities that are valid for scheduling.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

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

Reporting

Real-time Reporting

Real-time Reporting: The following figure shows the reporting flow:

Employee Engagement - WFM - Reporting

Approved and Authorised Staff

Agents

Supervisors

Forecasters

Schedulers

Can:
Generate
View
Schedule
Distribute
Export

Start

End

In these report categories

Configuration

Forecast

Performance

Schedule

Adherence

Audit

Approved, authorized staff have access to generate, schedule, and distribute out-of-the-box reports in the following categories:

- Configuration

- Forecast

- Performance

- Schedule

- Adherence

- Audit

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

Historical Reporting

The Genesys WFM 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

- API to GWFM is available.

Training Manager is available on an Azure Standalone cloud. Training Manager would be able to connect with

Genesys Engage on-premises platform and GWFM from the standalone cloud.

- The offer will be available only as a Hybrid Offer for Genesys Engage on-premises Customers. The offer consists of the following
    - Training Manager Thick client can be installed by administrators on their systems
    - Training Manager Servers will reside in Azure Standalone Cloud
    - Training Manager Portal will be hosted from the Azure Standalone cloud

Customer Responsibilities

Up-to-date schedules are configured, and access to non-WFM users such as managers/trainers is input. This use can also support NICE IEX and Teleopti Workforce Management solutions where the customer has those products available.

Document Version

- Version **v 1.0.2** last updated **February 25, 2026**