

Agent Self-Service

Genesys WFM Agent Self-Service Documentation

Study Notes

Topic	Description
Agent Portal	Web-based access to schedules, time-off, trades
Mobile App	iOS/Android for on-the-go schedule management
Desktop Features	View schedules, request time-off, trade shifts
Mobile Features	Push notifications, offline access, touch-friendly
Schedule View	Calendar and detailed views of shifts
Preferences	Availability, shift preferences, communication settings
Reporting	Personal adherence, performance history
Flexibility	Agent control over schedules within policy

Navigation

Agent Portal: Agent Self-Service URL (desktop) Mobile App: Genesys Tempo (iOS/Android)

Agent Self-Service Overview

Agent Self-Service empowers employees to manage their work schedules and make work-life balance decisions within company policies. Available on desktop web portal and mobile apps (iOS/Android), self-service reduces administrative burden on supervisors while giving agents more control over their schedules.

Agent Self-Service functions:

- View current and future schedules
- Request time-off with automatic approvals
- Propose and accept shift trades
- Set work preferences and availability
- Submit adherence explanations
- Track personal performance metrics
- Manage personal settings and contact info
- Receive schedule notifications

Self-Service Benefits

For Agents:

- └ Anytime access (24/7 from home/mobile)
- └ Flexibility to trade shifts easily
- └ Control over scheduling preferences
- └ Transparency in time-off balances
- └ Fast approvals (often automatic)
- └ Mobile convenience
- └ Peace of mind with visibility
- └ Reduced interactions with supervisor

For Supervisors:

- └ Reduced administrative work
- └ Faster request processing
- └ Better visibility of changes
- └ Fewer phone inquiries
- └ More time for coaching
- └ Accurate preference tracking
- └ Better agent satisfaction
- └ Improved team morale

For Organization:

- └ Improved agent satisfaction
- └ Better work-life balance perception

- └ Lower turnover risk
- └ Operational efficiency
- └ Cost savings (less admin time)
- └ Data accuracy
- └ Competitive advantage in hiring
- └ Agility in staffing changes

Desktop Web Portal

The desktop Agent Self-Service Portal is accessed through a web browser, providing full functionality on any computer with internet access.

Home Dashboard

Agent Portal Home:

Welcome Header:

- └ Agent Name: John Smith
- └ Site: New York - Support Team
- └ Next Shift: Tuesday 09:00-17:00 (2 days away)
- └ Status: On Schedule

Quick Actions (Buttons):

- └ View Full Schedule
- └ Request Time Off
- └ Find Shift Trades
- └ See My Performance
- └ Manage Preferences
- └ Contact Manager

Next Shift Details:

- └ Start Time: 09:00
- └ End Time: 17:00
- └ Activity: Support Voice
- └ Location: Manhattan Office
- └ Duration: 8 hours

└ Status: Confirmed

Recent Notifications:

- └ "Schedule updated for next week"
- └ "Time-off request approved"
- └ "John accepted your trade request"
- └ "Team meeting rescheduled"

Schedule View Features

My Schedule - Calendar View:

Calendar Display:

- └ 4-week view (customizable)
- └ Color-coded by activity:
 - | └ Blue: Voice Support
 - | └ Green: Email Support
 - | └ Yellow: Training
 - | └ Gray: Time Off
 - | └ Red: Holiday
 - | └ White: Day Off
- └ Click date for details
- └ Drag to copy/move
- └ Export to calendar app

Shift Details (Click Any Shift):

- └ Date: Tuesday, March 18, 2026
- └ Start: 09:00 | End: 17:00
- └ Duration: 8 hours 0 minutes
- └ Activity: Support Voice
- └ Queue: Support_Queue_001
- └ Break 1: 10:30-10:45 (15 min)
- └ Lunch: 12:00-13:00 (1 hour)
- └ Break 2: 14:30-14:45 (15 min)
- └ Location: Office
- └ Manager: Jane Doe
- └ Notes: Regular schedule

Historical Schedule:

- └ View past weeks (up to 12 months)
- └ Review actual vs scheduled
- └ Track adherence history
- └ Understand patterns

Future Schedule:

- └ View up to 26 weeks forward
- └ Plan ahead for preferences
- └ Identify conflicts early
- └ See blackout dates
- └ Plan time-off accordingly

Time-Off Management

Request Time Off:

Simple Workflow:

1. Click "Request Time Off"
2. Select Type:
 - └ Vacation
 - └ Sick Leave
 - └ Personal Time
 - └ Unpaid
 - └ Other
3. Select Dates (Calendar Picker):
 - └ Click start date
 - └ Click end date
 - └ See selected dates highlighted
 - └ Show conflicting requests
4. Add Notes (Optional):
 - └ "Family visit" or "Medical appointment"
5. Review & Submit:
 - └ Confirm dates
 - └ See balance impact
 - └ Check approval likelihood
 - └ Submit request

View Status:

└ Pending Requests:

- | └ March 20-21 (Vacation) - PENDING
- | └ Submitted: 3 days ago
- | └ Required days notice: Met (14 days)
- | └ Status: Awaiting manager review
- |

└ Approved:

- | └ April 5-10 (Vacation) - APPROVED
- | └ June 15 (Personal) - APPROVED
- | └ July 4 (Holiday) - AUTOMATIC
- |

└ Rejected:

- └ None recorded
- └ No rejections in history

View Balances:

└ Vacation:

- | └ Total Available: 20 days
- | └ Used YTD: 5 days
- | └ Pending Requests: 2 days
- | └ Remaining: 13 days
- |

└ Sick Leave:

- | └ Total Available: 10 days
- | └ Used YTD: 2 days
- | └ Pending Requests: 0 days
- | └ Remaining: 8 days
- |

└ Personal Time:

- └ Total Available: 5 days
- └ Used YTD: 1 day
- └ Pending Requests: 0 days
- └ Remaining: 4 days

Shift Trading

Find Shift Trades:

Search Interface:

- └ Start Date Picker
- └ End Date Picker
- └ Activity Filter (Optional):
 - | └ All Activities
 - | └ Voice Support Only
 - | └ Email Support Only
- └ Time Filter (Optional):
 - | └ Morning (before 12:00)
 - | └ Afternoon (12:00-17:00)
 - | └ Evening (after 17:00)
- └ Search Button

Results Display:

- └ Agent 1: Thomas
 - | └ Shift: Thursday 10:00-18:00 (Support Voice)
 - | └ Skills Match: Yes ✓
 - | └ Propose Trade: Button
 - | └ View Profile: Link
 - |
- └ Agent 2: Maria
 - | └ Shift: Friday 09:00-17:00 (Support Voice)
 - | └ Skills Match: Yes ✓
 - | └ Propose Trade: Button
 - | └ View Profile: Link
 - |
- └ Agent 3: David
 - | └ Shift: Wednesday 14:00-22:00 (Email Support)
 - | └ Skills Match: Partial △
 - | └ Propose Trade: Button (with note)
 - | └ View Profile: Link

Propose Trade:

1. Select agent from results
2. Confirm Details:
 - └ My Shift: Friday 09:00-17:00
 - └ Their Shift: Thursday 10:00-18:00

- └ Skills Compatibility: Verified ✓
- └ Activity Match: Voice to Voice ✓

3. Add Message (Optional):

- └ "Really appreciate if you can help!"

4. Send Trade Request

Track Pending Trades:

└ Request Sent:

- | └ To: Thomas (Friday trade)
- | └ Sent: 2 hours ago
- | └ Status: AWAITING RESPONSE
- | └ Cancel Request: Option
- |

└ Requests Received:

- | └ From: Sarah (Tuesday trade)
- | └ Received: 1 hour ago
- | └ Shift Details: Mon 09-17 for Wed 14-22
- | └ Accept: Button
- | └ Decline: Button
- |

└ Completed Trades:

- └ Traded with Jason (March 10)
- └ Traded with Lisa (February 28)
- └ View History: Link

Personal Preferences

Manage Preferences:

Basic Information:

- └ Name: John Smith (Read-only)
- └ Email: john.smith@company.com (Editable)
- └ Phone: 212-555-0123 (Editable)
- └ Site: New York Support (Read-only)
- └ Team: Support Tier 1 (Read-only)
- └ Manager: Jane Doe (Read-only)
- └ Start Date: January 15, 2023 (Read-only)

Availability Windows:

- └ Preferred Start Time: 09:00
- └ Preferred End Time: 17:00
- └ Can Start Earlier: 08:00 (Willing)
- └ Can End Later: 18:00 (Willing)
- └ Days Preferred: Mon-Fri
- └ Weekends: Not preferred
- └ Save Preferences: Button

Scheduling Preferences:

- └ Split Shifts: Not preferred
- └ Consecutive Days Worked: Max 5 (preferred)
- └ Days Off Preference: Mondays (if possible)
- └ Break Timing: Before 11:00 preferred
- └ Lunch Timing: 12:00-13:00 preferred
- └ Flexibility: Moderate (willing to adjust)
- └ Save Preferences: Button

Work Preferences:

- └ Preferred Activity: Voice Support
- └ Willing to Blend: Yes (40% email)
- └ Open to New Activities: Yes
- └ Overtime Interest: Some (up to 5 hrs/week)
- └ Schedule Variation: Prefer consistency
- └ Save Preferences: Button

Communication Preferences:

- └ Schedule Updates: Email SMS App
- └ Emergency Notices: Email SMS Phone
- └ Shift Changes: Email SMS
- └ Manager Messages: Email App
- └ Preferred Language: English
- └ Save Preferences: Button

Performance & Reporting

My Performance:

Adherence:

└─ Current Week Adherence: 94%

| └─ Status: ✓ Excellent (>90%)

└─ Last Week Adherence: 91%

| └─ Status: ✓ Good

└─ Monthly Average: 92%

| └─ Trend: Improving ↑

└─ YTD Average: 91%

| └─ Status: On Target

└─ View Detailed Report: [Link](#)

Quality Metrics:

└─ Customer Satisfaction: 4.2/5.0 (if tracked)

└─ Call Quality Score: 87/100 (if tracked)

└─ First Contact Resolution: 92% (if tracked)

└─ Email Response Quality: Good (if tracked)

└─ View Detailed Report: [Link](#)

Historical Data:

└─ Adherence by Week (chart)

└─ Adherence by Day (breakdown)

└─ Attendance Record (details)

└─ Coaching Feedback (recent)

└─ Export to Excel: Option

Submit Adherence Explanation:

└─ If below threshold (e.g., <85%):

| └─ Day: Monday

| └─ Reason: Training session (unplanned)

| └─ Duration: 1 hour 30 min

| └─ Explanation: "Emergency product training"

| └─ Submit: Button

└─ Manager notified of explanation

Mobile App (iOS/Android)

The mobile Genesys Tempo app provides schedule management on-the-go with push notifications and offline access.







Mobile Features

Mobile Home Screen:





Next Shift Widget:

- └ Date & Day: Tuesday, March 18
- └ Time: 09:00 - 17:00
- └ Countdown: "In 2 days"
- └ Activity: Support Voice
- └ Tap to Expand

Quick Action Buttons:

- └  View Schedule (Calendar)
- └  Request Time Off
- └  Find Trades
- └  My Performance
- └  Preferences
- └  Message Manager

Recent Notifications:

- └  Schedule Updated (2 hrs ago)
- └  Time-off Approved (5 hrs ago)
- └  Trade Request from Sarah (1 hr ago)
- └  Meeting Scheduled (1 day ago)


Swipe Navigation:

- └ ← Left: Previous week/section
- └ Right →: Next week/section

Schedule View (Mobile)

Mobile Schedule - Week View:

Compact Calendar:

- └ MON | TUE | WED | THU | FRI | SAT | SUN
- └ [Off] [9-5] [9-5] [9-5] [9-5] [Off] [Off]
- | 
- | (Color indicates activity)

|

└ Tap date for full shift details

└ Swipe to change week

Shift Detail View (Tap Shift):

└ Tuesday, March 18

└ 09:00 - 17:00 (8 hours)

└ Support Voice

└ Break: 10:30-10:45

└ Lunch: 12:00-13:00

└ Location: NYC Office

└ Map/Directions: Button (if location enabled)

└ Options:

└ Trade This Shift

└ Request Time Off

└ Contact Manager

Day/Week/Month Toggle:

└ Day View

└ Week View (default)

└ Month View

└ Switch Views: Swipe

Offline Capability:

└ Download Schedule: Auto-sync

└ View While Offline: Yes

└ Add Local Notes: Yes

└ Sync When Online: Auto

└ Notification: "Offline Mode"

Time-Off on Mobile

Request Time-Off Flow:

1. Tap "Request Time Off"

2. Select Type:

└ Vacation

└ Sick Leave

- └ Personal Time

- └ Unpaid

- └ Other

3. Pick Dates (Calendar Picker):

- └ Tap start date

- └ Tap end date

- └ Dates highlight in blue

- └ Conflicts shown in red

- └ Next >

4. Review & Confirm:

- └ "March 20-21 (2 days)"

- └ "Vacation"

- └ "Balance: 13 remaining"

- └ "Likely: Auto-Approved ✓"

- └ Submit >

5. Confirmation:

- └ "Request Submitted"

- └ "Status: PENDING"

- └ "Check status in Profile"

- └ Back to Home

Notification When Approved:

- └ Push: "Your time-off approved!"

- └ Show Status: APPROVED

- └ Dates Added to Calendar

- └ Sync with phone calendar (option)

Mobile Notifications

Push Notification Types:

Schedule Changes:

- └ "Your schedule for next week updated"

- └ "New shift added: Friday 2-10pm"

- └ "Shift cancelled: Thursday"

└ Tap: Shows schedule change

Time-Off Status:

└ "Your vacation request approved"

└ "Time-off request pending manager review"

└ "Time-off request denied - resubmit?"

└ Tap: Shows status and details

Shift Trade Activity:

└ "Thomas accepted your trade!"

└ "Sarah wants to trade with you"

└ "Your trade request expired"

└ Tap: Shows trade details

Manager Messages:

└ "Message from Jane: 'Great work!'"

└ "Schedule preference updated"

└ "Team announcement posted"

└ Tap: Shows message/details

General:

└ "Payroll posted"

└ "Benefits reminder"

└ "Training available"

└ Tap: Shows details

Notification Settings:

└ Toggle each notification type

└ Quiet Hours: (e.g., 22:00-08:00)

└ Sound: On/Off

└ Vibration: On/Off

└ Do Not Disturb: Honor system

└ Save Settings: Button

Mobile Preferences

Settings (Gear Icon):

Account:

- └ Name: John Smith
- └ Email: john.smith@... (Editable)
- └ Phone: (Editable)
- └ Password: Change (Button)
- └ Log Out: Button
- └ About App: Version info

Notifications:

- └ Schedule Updates: ✓ ON
- └ Time-Off Status: ✓ ON
- └ Trade Requests: ✓ ON
- └ Messages: ✓ ON
- └ Quiet Hours: 22:00-08:00
- └ Sound: ✓ ON
- └ Vibration: ✓ ON

Display:

- └ Dark Mode: OFF (toggle)
- └ Language: English (dropdown)
- └ Time Format: 24-hour (toggle)
- └ Calendar View: Week (default)
- └ Font Size: Normal (slider)

Preferences:

- └ Sync Schedule: Every 1 hour
- └ Offline Storage: Enabled
- └ Calendar Export: iCal/Outlook
- └ Contact Manager: Phone/Email
- └ Save Preferences: Button

Privacy:

- └ Location Services: (Ask)
- └ Camera Access: Disabled
- └ Contacts Access: Disabled
- └ Calendar Access: Enabled
- └ Privacy Policy: Link
- └ Terms of Service: Link

Best Practices

Portal Usage

- **Check Regularly** - Review schedule weekly
- **Plan Ahead** - Request time-off early (2+ weeks)
- **Proper Trades** - Ensure skill compatibility
- **Clear Communication** - Add notes on trade requests
- **Respect Policies** - Follow company rules
- **Use Preferences** - Set accurate preferences for fairness

Mobile App

- **Push Notifications** - Keep enabled for updates
- **Download Schedule** - Offline access for reliability
- **Timely Response** - Answer trade requests quickly
- **Update Contact Info** - Keep manager in touch
- **Feedback** - Report issues to IT
- **Security** - Don't share login credentials

Agent Satisfaction

- **Empower Agents** - Use system for control
- **Transparency** - Show time-off balances clearly
- **Fast Approvals** - Minimize manager review delays
- **Clear Policies** - Communicate rules openly
- **Support** - Provide help desk for issues
- **Continuous Improvement** - Listen to feedback

Interview Cheat Sheet

Question	Answer
What's agent self-service?	Web/mobile portal for agents to manage schedules
Desktop vs mobile?	Desktop full features, mobile on-the-go convenience
Can agents see schedules?	Yes, up to 26 weeks forward

Question	Answer
Request time-off?	Yes, desktop/mobile with auto-approval for qualifiers
Shift trading?	Yes, propose trades with other agents
Auto-approval?	Yes, if request meets criteria (balance, notice, staffing)
Mobile app name?	Genesys Tempo (iOS/Android)
Offline access?	Yes, download schedule to device
Push notifications?	Yes, optional for all major events
Trade approval?	Auto-approved if rules met, else supervisor review
Can set preferences?	Yes, scheduling and communication preferences
View performance?	Yes, adherence, quality, history
Contact manager?	Yes, message/chat from portal
Schedule export?	Yes, to Outlook/Google Calendar

Key Takeaways

- **Anytime Access** - 24/7 portal on desktop and mobile
- **Agent Empowerment** - Control over schedules and preferences
- **Work-Life Balance** - Easy time-off requests and trades
- **Automation** - Auto-approvals reduce admin burden
- **Transparency** - Clear visibility of balances and requests
- **Mobile First** - Genesys Tempo app for on-the-go
- **Offline Support** - Access schedule without internet
- **Notifications** - Push alerts for all important updates
- **Performance Visibility** - Track own adherence and metrics
- **Supervisor Relief** - Reduces administrative workload significantly

Additional Resources

Official Documentation

- Agent Self-Service: help.genesys.cloud/articles/workforce-management-for-agents/
- Genesys Tempo: help.genesys.cloud/articles/genesys-tempo-mobile-schedule-management/

- Portal Features: all.docs.genesys.com/PEC-WFM/Current/Agent/

Support & Training

- Genesys University: genesys.com/training
 - Community Forums: <https://community.genesys.com>
 - Technical Support: <https://support.genesys.com>
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