

Scheduling & Work Plans

Genesys WFM Scheduling & Work Plans Documentation

Study Notes

Topic	Description
Scheduling Methods	3 approaches: Load-based (forecast), Shift pattern, Blank schedule
Schedule Window	26-week visibility (± 26 weeks from current), one master per BU
Generation Period	Maximum 6 weeks at a time
Work Plan	Defines shifts, breaks, meals, contracts, weekly constraints
Shift Items	Breaks and meals with time windows and configuration
Schedule Bidding	Agents bid on pre-created schedules
Master Schedule	Published schedule available to all agents

Navigation

Admin → Workforce Management → Scheduling OR Menu → Workforce Management → Scheduling → Schedules

Scheduling Overview

Scheduling is the process of assigning agents to work times that balance forecasted demand, service level goals, agent preferences, contract obligations, and business constraints. WFM scheduling creates optimal schedules for multi-skilled agents handling different interaction types across multiple sites.

The scheduler considers each agent's individual skills, contracted working rules, and calendar items to identify when each agent can work and what work they will perform. Once finalized, schedules are published to the Master Schedule where agents view and potentially trade them.

Scheduling Objectives

- **Demand Coverage** - Match staffing to forecasted volume and AHT
- **Service Level Achievement** - Achieve SL, ASA, abandon rate targets
- **Contract Compliance** - Respect working rules and labor laws
- **Agent Preferences** - Accommodate scheduling preferences where possible
- **Flexibility** - Enable shift trades and time-off requests
- **Optimization** - Minimize over/under staffing

Scheduling Scope

- **Business Unit Level** - Schedules created for entire BU
 - **Time Granularity** - Hourly detail, weekly structure
 - **Planning Period** - 26 weeks forward (can search 104 weeks)
 - **Generation Window** - 6 weeks maximum per schedule
 - **One Master** - One published master schedule per BU at a time
 - **Future Schedules** - Multiple scenarios before publishing
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Three Scheduling Methods

WFM provides three primary scheduling methods, each suited to different scenarios:

Method 1: Load-Based Scheduling with Forecasts

Load-based scheduling uses the published Master Forecast to determine required staffing at each hour, then creates agent schedules to meet those requirements.

How Load-Based Scheduling Works:

Master Forecast Published

- └ Volume forecast (Offered)
- └ AHT forecast
- └ By planning group and hour

WFM Scheduler Receives Forecast

- └ Calculates required agents by hour
- └ Factors in service level goals
- └ Applies shrinkage rules
- └ Determines agent needs (staffing target)

Apply Constraints

- └ Agent skills and proficiency
- └ Contract working rules
- └ Availability and preferences
- └ Existing calendar items
- └ Team assignments

Generate Schedule

- └ Assign agents to shifts
- └ Balance workload across agents
- └ Optimize shift times
- └ Minimize over/under staffing

Optimize for Efficiency

- └ Minimize overtime
- └ Maximize full utilization
- └ Consider split shifts
- └ Adjust for specific requests

Output: Optimized schedule tied to demand

Load-Based Characteristics:

- **Data-Driven** - Based on forecasted demand
- **Demand-Responsive** - Adjusts to volume changes
- **Constraint-Aware** - Respects contracts and preferences
- **Accurate Staffing** - Right people, right time
- **Dependent on Forecast** - Only as good as forecast

When to Use Load-Based:

- ✓ Have accurate Master Forecast
- ✓ Want demand-driven scheduling
- ✓ Need to achieve service levels
- ✓ Have multiple media types
- ✓ Want cost optimization

Load-Based Limitations:

- ✗ Dependent on forecast quality
- ✗ Requires forecast to be published
- ✗ Cannot create without forecast
- ✗ Changes to forecast require reschedule

Load-Based Example:

Master Forecast for Support Planning Group:

Monday: 08:00-09:00: 50 calls, AHT 300s → Need 5 agents

09:00-10:00: 75 calls, AHT 300s → Need 7 agents

10:00-11:00: 100 calls, AHT 300s → Need 10 agents

11:00-12:00: 95 calls, AHT 300s → Need 9 agents

... (continue for full day)

Schedule Generated:

- Agent1: 08:00-16:30 (8.5 hours, with 1 hour lunch)

- Agent2: 08:30-17:00 (8.5 hours, with 1 hour lunch)

- Agent3: 09:00-17:30 (8.5 hours, with 1 hour lunch)

- Agent4: 10:00-18:30 (8.5 hours, with 1 hour lunch)

- ...and so on

Result: 10 agents scheduled for peak period (10:00-11:00)

Efficiency: Minimal over/under staffing

Method 2: Shift Pattern-Based Scheduling (Without Forecasts)

Shift pattern-based scheduling creates schedules based on predefined shift patterns without using forecast data. Useful when forecasts are unavailable or when standard shifts are preferred.

How Shift Pattern Scheduling Works:

Define Shift Patterns (Work Plans)

- └ Pattern A: 09:00-17:30 (Monday-Friday)
- └ Pattern B: 10:00-18:30 (Tuesday-Saturday)
- └ Pattern C: Flex (varies by week)
- └ Pattern D: Part-time (13:00-17:00, Mon-Wed)

Determine Agent Allocation

- └ How many agents per pattern?
- └ How many full-time vs part-time?
- └ How many per location/team?
- └ How many per skill group?

Assign Agents to Patterns

- └ Match agent skills to patterns
- └ Consider preferences
- └ Balance across teams
- └ Respect availability

Generate Schedule

- └ Agents follow assigned patterns
- └ All agents same shift per week
- └ No forecast-based adjustments
- └ Predictable recurring schedule

Output: Consistent repeating schedule (no forecast needed)

Shift Pattern Characteristics:

- **No Forecast Required** - Works without demand data
- **Predictable** - Same pattern each week
- **Simple** - Easy for agents to understand
- **Cost-Predictable** - Fixed staffing levels
- **Limited Flexibility** - Cannot adjust to volume changes

When to Use Shift Pattern:

- ✓ No accurate forecast available
- ✓ Want simple repeating schedules
- ✓ Prefer staffing stability
- ✓ New contact center (building history)
- ✓ Fixed cost model required

Shift Pattern Limitations:

- ✗ Not demand-responsive
- ✗ May over/under staff
- ✗ Cannot meet varying service levels
- ✗ Inefficient for volatile volume

Shift Pattern Example:

Staffing Plan: 30 agents

Shift Pattern Distribution:

- └ Pattern A: 09:00-17:30, Mon-Fri (12 agents)
- └ Pattern B: 10:00-18:30, Tue-Sat (10 agents)
- └ Pattern C: 12:00-20:00, Wed-Sun (8 agents)
- └ Total: 30 agents, consistent coverage all day

Schedule Result:

- └ Agents A1-A12: Always 09:00-17:30
- └ Agents B1-B10: Always 10:00-18:30
- └ Agents C1-C8: Always 12:00-20:00
- └ Same schedule every week (no variation)

Method 3: Blank Schedule Creation

Blank schedules create agent slots with no agent names assigned, useful for:

- Evaluating new shift patterns before agent assignment
- Planning for future hiring
- Testing schedule scenarios
- Creating templates for agent bidding

Blank Schedule Methods:

3A. Profile-Based Scheduling:

Create Profiles (Agent Templates):

- └ Profile: Full-Time Support (40 hrs/week)
 - └ Skills: Support_Level_2, Account_Mgmt
- └ Profile: Part-Time Support (20 hrs/week)
 - └ Skills: Support_Level_1

- └ Profile: New Hire Flex (Variable)
 - | └ Skills: None yet (training)
- └ Profile: Sales Support (32 hrs/week)
 - └ Skills: Sales, Support_Level_1

Generate Blank Schedule Using Profiles:

- └ 20 Full-Time profiles (800 hours)
- └ 15 Part-Time profiles (300 hours)
- └ 5 New Hire profiles (160 hours)
- └ 10 Sales Support profiles (320 hours)

Result: 50 blank shifts, ready for agent assignment

Use: Plan hiring, test new patterns, create bidding pools

3B. Schedule Bidding:

Create Blank Schedule

- └ 30 distinct shifts (no agent names)
- └ All with required skills
- └ Covering all time periods

Open for Agent Bidding

- └ Agents view 30 available shifts
- └ Rank preferences: 1 (most wanted) to 30
- └ Submit bids by deadline
- └ Supervisors review bids

WFM Automated Assignment

- └ Algorithm considers:
 - | └ Agent preferences (bid ranking)
 - | └ Seniority (longer tenure weighted higher)
 - | └ Skill match
 - | └ Coverage requirements
- └ Output: Assigned schedule

Result: Fair assignment matching agent preferences

Benefit: High satisfaction, voluntary participation

Blank Schedule Characteristics:

- **No Agents Yet** - Empty slots

- **Template Use** - Test patterns before deployment
- **Hiring Planning** - Determine future hiring needs
- **Flexibility** - Can assign agents later
- **Bidding Ready** - Prepare for agent selection

When to Use Blank Schedule:

- ✓ Planning new locations/teams
- ✓ Testing shift pattern changes
- ✓ Preparing for schedule bidding
- ✓ Evaluating staffing models
- ✓ Future hiring scenarios

Work Plans

Work Plans define how agents work: shifts, breaks, meals, contracts, weekly constraints, and labor compliance rules.

Work Plan Components:

Work Plan: Standard Full-Time Support

1. Shift Definition

- └─ Start Time: 08:00
- └─ End Time: 16:30
- └─ Duration: 8 hours 30 minutes
- └─ Paid Hours: 8 hours (lunch unpaid)
- └─ Days Available: Monday-Friday

2. Breaks

- └─ Break 1:
 - | └─ Name: Morning Break
 - | └─ Duration: 15 minutes
 - | └─ Timing: 10:00-12:00 window
 - | └─ Paid: Yes
- └─ Break 2:
 - | └─ Name: Afternoon Break
 - | └─ Duration: 15 minutes
 - | └─ Timing: 14:00-15:30 window
 - | └─ Paid: Yes

└ Total Break: 30 minutes paid

3. Meals

└ Meal: Lunch

| └ Duration: 1 hour

| └ Timing: 12:00-13:00 window

| └ Paid: No

| └ Required: Yes

4. Work Rules (Contract)

└ Min Hours/Week: 40

└ Max Hours/Week: 40

└ Max Consecutive Days: 5

└ Min Hours/Day: 8

└ Max Hours/Day: 9 (includes breaks/meal)

└ Days Off Required: 2 consecutive

└ Overtime Rules: After 40 hrs/week

5. Weekly Constraints

└ Min Full Days/Week: 5

└ Max Split Days/Week: 1

└ Min Days Off/Week: 2

└ Weekend Rule: Flexible

6. Planning Periods

└ Planning Period: 1 week

└ Minimum Periods: 4 weeks

└ Maximum Periods: 26 weeks

7. Additional Rules

└ Lunch Hour Timing: 11:00-13:30 window

└ Break Timing: 09:00-16:00 available

└ Shift Flexibility: ± 30 min start/end

└ Blending Allowed: Multiple activities/day

Work Plan Best Practices:

- **Clear Definition** - Unambiguous rules
- **Legal Compliance** - Labor law adherence
- **Flexibility** - Account for agent needs
- **Simplicity** - Easy for agents to understand

- **Documentation** - Maintain copies
- **Testing** - Validate before deployment

Creating a Work Plan:

1. Navigate to Admin → Workforce Management → Work Plans
2. Click Create Work Plan
3. Define:
 - Shift patterns (start, end, duration)
 - Break configuration (when, how long, paid/unpaid)
 - Meal configuration (when, how long, paid/unpaid)
 - Work rules (min/max hours, consecutive days)
 - Weekly constraints (full days, split days, days off)
 - Planning period structure
4. Save and activate

Work Plan Scenarios:

Example 1: Full-Time Permanent

- └ 08:00-16:30, Mon-Fri
- └ 30 min paid breaks
- └ 1 hour unpaid lunch
- └ 40 hours/week guaranteed
- └ Use: Core permanent staff

Example 2: Part-Time Flexible

- └ Variable 4-8 hours/day
- └ 15 min break per 4 hours
- └ 30 min lunch if >6 hours
- └ 20 hours/week average
- └ Use: Supplemental staff

Example 3: Shift Work (24/7 Coverage)

- └ Shift A: 07:00-15:00 (8 hours)
- └ Shift B: 15:00-23:00 (8 hours)
- └ Shift C: 23:00-07:00 (8 hours)
- └ Rotation: 3-day on, 4-day off
- └ Use: 24/7 contact centers

Example 4: Flex Hours

- └ Core hours: 10:00-15:00 (required)
- └ Flex hours: 08:00-10:00 or 15:00-18:00

- └ Total: 40 hours/week
 - └ Breaktime: Flexible
 - └ Use: Modern flexible work
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Schedule Management

Creating a Schedule

Step 1: Schedule Setup

1. Navigate to Admin → Workforce Management → Schedules
2. Click Create Schedule
3. Configure:
 - **Name** - Descriptive identifier (e.g., "Q2_2026_Week1-6")
 - **Period Start** - First day to schedule
 - **Period End** - Last day to schedule
 - **Duration** - Maximum 6 weeks
 - **Business Unit** - Select parent BU
 - **Planning Groups** - Include relevant groups
4. Click Next

Step 2: Forecast Selection (Load-Based Only)

1. Select Master Forecast or scenario
2. Click Next

Step 3: Scheduling Method

1. Select method:
 - Load-Based (with forecast)
 - Shift Pattern (without forecast)
 - Blank Schedule
2. Configure method-specific options
3. Click Next

Step 4: Constraints

1. Verify agent assignments
2. Confirm work plans
3. Set parameters:
 - Allow overtime? Yes/No

- Allow split shifts? Yes/No
- Allow part-time? Yes/No

4. Click Next

Step 5: Generate

1. Click Generate Schedule
2. WFM processes agents and shifts
3. Creates optimized schedule
4. Displays results

Step 6: Review & Adjust

1. Review coverage by hour
2. Check staffing levels:
 - ✓ Service level achievable
 - ✓ No excessive overtime
 - ✓ Agent preferences honored
 - ✓ No contract violations
3. Make manual adjustments if needed
4. Compare coverage to forecast

Step 7: Publish

1. Click Publish to Master Schedule
2. Confirm publication
3. Schedule immediately available to agents
4. Becomes official working schedule

Publishing Process

Schedule Generated



Status: Draft (not yet published)

└ Visible only to admins/supervisors

└ Can be edited

└ Can be deleted

└ Agents cannot see

Manual Review Period

└ Check coverage

└ Verify service level

└ Review agent satisfaction

└─ Make final adjustments

Click: Publish to Master Schedule



Status: Published (now official)

└─ Visible to all agents

└─ Agents can request time-off

└─ Agents can trade shifts

└─ Enforced for adherence

Benefits:

└─ Only one master schedule per BU

└─ All agents see same official schedule

└─ Clear baseline for adherence

└─ Foundation for real-time monitoring

One Master Schedule Per Business Unit

Important Constraint:

- Only ONE master schedule can be active per business unit at a time
- Publishing a new schedule replaces the previous one
- Previous schedule versions retained in history
- Agents see only current master schedule

Implication:

Scenario: Multi-week scheduling

Option A: Publish all at once

└─ Create 26-week schedule (6 weeks per period)

└─ Generate schedule periods 1-6 (weeks 1-6)

└─ Publish to master

└─ Weeks 1-6 active immediately

└─ During week 1: Generate periods 2-7 (weeks 7-12)

└─ At end of week 6: Publish next 26 weeks

└─ Result: Continuous 26-week visibility

Option B: Publish as needed

└─ Create schedule for weeks 1-6 only

- └ Publish to master
- └ During week 3: Create schedule for weeks 7-12
- └ At end of week 6: Publish weeks 7-12
- └ Result: Constant re-planning cycle

Schedule Window & Visibility

26-Week Window

The Schedules list displays a maximum of:

- **26 weeks PRIOR** from earlier of current week or last schedule week
- **26 weeks FORWARD** from earlier of current week or last schedule week

26-Week Window Example:

Today: March 10, 2026 (Week 11 of year)

Visible Window:

- └ Start: September 1, 2025 (Week 36-11 = Week 25 back)
 - | └ Actually visible: ~26 weeks back from now
- └ Current: March 10, 2026 (Week 11)
- └ End: September 1, 2026 (Week 36)
 - | └ 26 weeks forward from now

Outside Visible Window:

- └ Before: August 2025 and earlier
 - | └ Available via search feature
- └ After: September 2026 and later
 - | └ Available via search feature

Search Capability

The search feature extends beyond the 26-week window:

- **Search Range** - Up to 104 weeks (2 years)
- **Use Search** - Find old schedules or far-future plans

- **Filters** - By date range, status, name
 - **Download** - Export search results
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Scheduling Constraints

WFM applies multiple constraints during scheduling:

Agent-Level Constraints:

- Individual skills and proficiency
- Current work schedule
- Time-off requests
- Calendar items (training, meetings)
- Availability windows
- Maximum hours/week limit
- Minimum hours/day

Contract-Level Constraints:

- Employment type (full-time, part-time, flex)
- Minimum/maximum hours per week
- Maximum consecutive work days
- Minimum consecutive days off
- Lunch and break requirements
- Overtime rules
- Split shift limitations

Team/Site-Level Constraints:

- Required staffing levels
- Coverage requirements
- Minimum agents per activity
- Team balance
- Cross-training requirements
- Backup coverage needs

Business-Level Constraints:

- Service level goals
- Cost budget
- Overtime authorization
- Skill mix requirements
- New hire integration

- Manager approval requirements

Schedule Metrics

Coverage Analysis

Staffing Report:

Hour	Forecast	Scheduled	Variance	Coverage
08:00-09:00	6 agents	6 agents	0 (0%)	✓ 100%
09:00-10:00	8 agents	8 agents	0 (0%)	✓ 100%
10:00-11:00	12 agents	11 agents	-1 (-8%)	⚠ 92%
11:00-12:00	11 agents	11 agents	0 (0%)	✓ 100%
12:00-13:00	9 agents	9 agents	0 (0%)	✓ 100%
13:00-14:00	10 agents	10 agents	0 (0%)	✓ 100%
14:00-15:00	10 agents	11 agents	+1 (+10%)	✓ 110%
15:00-16:00	8 agents	8 agents	0 (0%)	✓ 100%
16:00-17:00	6 agents	6 agents	0 (0%)	✓ 100%
Daily Total	80 agents	80 agents	0 (0%)	✓ 100%

Analysis:

- ✓ Good overall coverage (100%)
- ⚠ Slight under-staffing at peak (10:00-11:00)
- ✓ Minimal over-staffing (hour 14:00)
- ✓ Efficient balance achieved

Efficiency Metrics

Schedule Efficiency Report:

Metric	Value	Target	Status
Total Scheduled Hours	4,000	4,020	96%

Required Staffing Hours	3,800	3,800	100%
Over-Staffing Hours	200	200	On-target
Overtime Hours (>40/week)	120	100	⚠ High
Average Hours/Agent	40.0	40.0	✓ On-target
Agents with Overtime	3/50	0	⚠ 6%
Average Shift Length	8.5h	8.5h	✓ On-target
Part-Time Usage	12/50	12/50	✓ On-target
Multi-Activity Assignments	35/50	30/50	✓ Good blend
Cost per Hour	\$45.50	\$45.00	⚠ 1% over

Overall Efficiency: 94% (Good)

Real-World Examples

Example 1: 100-Agent Contact Center

Scenario: Mid-size support center, 100 agents

Master Forecast Published:

- └ Weekly volume: 15,000 calls
- └ Average AHT: 300 seconds
- └ Service level goal: 80% in 20 seconds
- └ Staffing required: ~95 agents

Work Plans:

- └ Full-time: 40 hrs/week (70 agents)
- └ Part-time: 20 hrs/week (20 agents)
- └ Flex: 10-30 hrs/week (10 agents)
- └ Total: 100 agents

Schedule Generated:

- └ Create 6-week schedule (weeks 1-6)
- └ Use load-based method with Master Forecast
- └ Generate optimized shifts
- └ Coverage verified:
 - | └ Monday-Friday peak: 12-13 agents/hour

- | └ Monday-Friday valley: 5-6 agents/hour
- | └ Weekend: 3-4 agents (limited hours)
- | └ Night: Minimal coverage (auto-handled)
- └ Overtime: 5% of agents (acceptable)
- └ Agent satisfaction: High (preferences honored)

Publish to Master Schedule

- └ Week 1 effective immediately
- └ Agents view on portal
- └ Time-off requests begin
- └ Adherence tracking starts

Management:

- └ Monitor actual vs forecast
- └ Handle shift trades
- └ Approve time-off requests
- └ Real-time adjustments as needed

Example 2: Growing Business (Scaling Up)

Scenario: Adding new team (20 agents) for new product

Situation:

- └ Current: 100 agents fully scheduled
- └ Adding: 20 new agents (onboarding week 3)
- └ Challenge: How to integrate new team?

Solution:

Phase 1 (Weeks 1-2): Current schedule

- └ Use existing 100-agent schedule
- └ All forecasts/schedules unchanged
- └ New team not yet integrated

Phase 2 (Week 3+): Reschedule with new team

- └ Week 2: Create new Master Forecast
 - | └ Include new product volume
 - | └ Adjust planning groups

- | └ Recalculate staffing needs (now 115 agents)
- └ Week 2: Generate new schedule (weeks 3-8)
 - | └ Include all 120 agents (100 existing + 20 new)
 - | └ Use load-based method
 - | └ Distribute new volume across team
 - | └ Assign new agents training hours
- └ Week 3: Publish new Master Schedule
 - | └ Replaces previous master
 - | └ All 120 agents see new schedule
 - | └ Service level improved (more agents)
 - | └ Coverage now matches expanded demand

Result:

- └ Smooth integration of new team
- └ Service level maintained/improved
- └ Existing agents' schedules adjusted fairly
- └ New agents fully utilized from start

Example 3: Holiday Season Planning

Scenario: Retail support (holiday surge)

Situation:

- └ Normal staffing: 80 agents
- └ Holiday season: Expected 150% volume
- └ Duration: November 20 - January 5
- └ Challenge: Massive temporary spike

Solution:

1. Forecast Planning (October)

- └ Marketing provides volume projections
- └ Create ABM forecast with holiday data
- └ Result: 15,000→22,500 daily calls (50% increase)
- └ Staffing needed: 80 agents → 120 agents

2. Hiring & Training (October)

- └ Hire 40 temporary agents
- └ 2-week training period

- └ Ramp to full productivity by week 3
- └ Flexible contracts (seasonal)

3. Work Plan Updates (October)

- └ Expand existing work plans
- └ Create temporary shift patterns
- └ 10:00-18:00 shifts (high volume hours)
- └ Weekend staffing added
- └ Overtime authorized for existing staff

4. Schedule Generation (October, weekly)

- └ Week 1 (Oct 30): 80 agents + 20 new trained
- └ Week 2 (Nov 6): 80 agents + 40 new trained
- └ Weeks 3-10 (Nov 13-Jan 5): Full 120 agents
- └ Week 11 (Jan 12): Ramp down to 80 agents

5. Real-Time Adjustments

- └ Week 1: Volume 15,200 calls (↓5% vs forecast)
- └ Week 2: Volume 23,100 calls (↑3% vs forecast)
- └ Week 3: Add 10 more agents (unplanned)
- └ Weeks 4-10: Adjust as actual trends emerge
- └ Week 11: Begin releasing temporary agents

6. Results

- └ Service level: 82% (goal 80%) ✓
- └ ASA: 18 seconds (goal 20s) ✓
- └ Abandon: 4% (goal 5%) ✓
- └ Temp agent cost: \$180,000
- └ Revenue increase: \$500,000
- └ ROI: 278% (strong business case)

Best Practices

Schedule Creation

- **Regular Cycle** - Create 6-week schedules weekly

- **Advance Planning** - 4-6 weeks notice to agents
- **Quality Review** - Verify coverage before publishing
- **Communication** - Announce new schedule to team
- **Version History** - Keep archive of old schedules
- **Flexibility** - Allow trades and time-off requests

Optimization

- **Monitor Variance** - Track actual vs scheduled
- **Adjust Timing** - Shift times to match real demand
- **Reduce Overtime** - Trim excessive OT through timing
- **Balance Load** - Equalize workload across agents
- **Agent Preferences** - Honor where possible
- **Cost Focus** - Minimize labor costs

Communication

- **Transparency** - Share with agents early
- **Rationale** - Explain scheduling decisions
- **Feedback** - Listen to agent concerns
- **Accessibility** - Portal available 24/7
- **Updates** - Notify of changes promptly
- **Support** - Help agents understand schedule

Interview Cheat Sheet

Question	Answer
3 scheduling methods?	Load-based (forecast), Shift pattern, Blank schedule
Load-based when?	Have accurate forecast, want demand-driven
Shift pattern when?	No forecast, want simple repeating schedule
Blank schedule when?	Planning hiring, testing patterns, bidding
How long schedule?	Max 6 weeks per generation
Schedule window?	26 weeks prior, 26 weeks forward
Master schedules per BU?	One active at a time
What's work plan?	Defines shifts, breaks, meals, contracts
Shift items?	Breaks and meals with time windows

Question	Answer
Scheduling constraints?	Skills, contracts, availability, service level
How verify coverage?	Compare scheduled agents to forecast
When publish?	After review, when ready for agents
Agent trades?	Allowed if approved, don't violate schedule
Schedule bidding?	Agents rank preference, auto-assigned
Reschedule how often?	Weekly or as needed for changes

Key Takeaways

- **Three Methods** - Load-based (forecast), Shift pattern, Blank schedule
- **6-Week Maximum** - Single generation limited to 6 weeks
- **26-Week Window** - Visibility and planning horizon
- **One Master** - Only one published schedule per BU active
- **Work Plans** - Define hours, breaks, meals, contracts
- **Constraints** - Skills, contracts, preferences all considered
- **Demand-Driven** - Load-based matches forecast to staffing
- **Optimization** - Minimize cost while achieving service level
- **Flexibility** - Agents can trade and request time-off
- **Continuous** - Weekly reschedule cycle for optimization

Additional Resources

Official Documentation

- Scheduling: help.genesys.cloud/articles/work-with-workforce-management-schedules/
- Work Plans: help.genesys.cloud/articles/work-plans-overview/
- Shift Patterns: help.genesys.cloud/articles/shift-patterns-overview/
- Schedule Constraints: help.genesys.cloud/articles/workforce-management-supported-configuration/

Support & Training

- Genesys University: genesys.com/training

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