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See Change Log for summary of changes.

GENESYS™

Interaction Optimizer

Requirements and Limitations Overview

Abstract

This document includes concise details about Interaction Optimizer tested and supported configuration, licensing support, hardware requirements, limitations, and a feature matrix.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

Interaction Optimizer configuration scale

The following table describes the maximum sizes of categories which have been designed, tested, and are supported. In some cases, the limit may be enforced in the UI and/or the back end. In other cases, these limits may not be enforced and, if exceeded, users may see performance degradation, timeouts, or other errors.

Category	Scope	Limit	Enforced	Warning	Notes
Agents	Scheduling unit	500	No	Yes	The system displays a warning during configuration if the scheduling units exceeds 500 agents.
Workgroups	Scheduling unit	50	No	No	
Staffing groups	Schedule	50	No	No	Unique 'workgroup(s) + media type(s) + skill set' combination amongst agents
Route groups	Short-term forecast or schedule	100	No	No	Unique 'workgroup + media type + skill set' combination

From the Interaction Optimizer home page, you can view the operating limits for a scheduling unit. For more information, see Operating limits in the Interaction Optimizer documentation.

If a scheduling unit exceeds operating limits or receives a warning, we recommend that you break up the scheduling unit to create two or more smaller scheduling units. Consider the following information before modifying a scheduling unit:

- Scheduling units with more than 500 agents should be broken up into smaller scheduling units.
- Since a workgroup can be associated with only one scheduling unit, ACD configuration and routing changes may be required to ensure a clean segmentation of resources and workgroups amongst the scheduling units.
- Consider that an overlap can exist between workgroups. For example, if the Workgroup metric shows 4 workgroups with 10 users each, the current Agents metric might not show 40 agents if an agent exists in multiple workgroups.
- The system uses the following calculation to determine the Route Groups category: (Workgroup x Skills x Interaction type)
- To reduce the number of route groups (for example, active and configured), consider splitting workgroups across separate scheduling units.
- To reduce the number of route groups (for example, active and configured), consider limiting the types of interaction a workgroup can support.
- Your unique environment requires that you carefully consider how best to meet the Interaction Optimizer limits while maintaining an appropriate scheduling grouping.

Concurrent licensing support

While Interaction Optimizer supports concurrent licensing for the pure user access type licenses (for example, "Interaction Optimizer Client Access"), it does not support concurrent licensing for the two non-user access licenses ("Interaction Optimizer Schedulable By Optimizer" and "Interaction Optimizer Real-time Adherence Tracking").

Hardware requirements

Minimum and recommended hardware requirements were revised for users who perform schedule creation and modification, and intraday reforecasting. To view the most up-to-date hardware requirements, see:

https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_installation_and_configuration/desktop/hardware_requirements.htm

The minimum requirements are:
- **Processor**: Intel® Core™ i7 Processor Extreme Edition with at least 4 cores or AMD equivalent (Fx)
- **Memory**: 8 GB system memory (DDR4-1600/2133)

Recommended requirements

Although the minimum requirements may be sufficient for most sites, sites with more impacting factors should follow these recommended requirements:
- **Processor**: Intel® Core™ i7 Processor Extreme Edition with at least 6 cores or AMD equivalent (Fx)
- **Memory**: 16 GB system memory (DDR4-1600/2133)

Software requirements

> **Note**: Interaction Optimizer requires Oracle 12.2 client to be installed as the default Oracle client. If the default Oracle client is not version 12.2, then you must set the ORACLE_HOME environment variable to specify the Oracle client install location.

To view the most up-to-date hardware requirements, see:

https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_installation_and_configuration/desktop/software_requirements.htm

Interaction Optimizer supported configuration and limitations

The following sections describe tested and supported configuration details and known limitations. Best practice recommends you review this information before implementing Interaction Optimizer in your environment.

Workforce environments

Interaction Optimizer has only been designed and tested for low latency environments. Network, database, and/or PureConnect Cloud latency can have a very significant impact on user interface responsiveness and user experience. Environments with consistent or even sporadic medium to high latency might result in unacceptable user experience.

Additional environment restrictions:
- **Interaction Director** - Interaction Optimizer is not compatible with an Interaction Director environment. Because Interaction Director routed calls do not log skills, Interaction Optimizer cannot forecast/schedule above/beyond site-level, etc.
- **Multi-site environments** - Interaction Optimizer does not work in a multi-site environment unless any given scheduling unit is wholly contained in a given site and there is no desire to forecast/schedule above/beyond site-level.

Forecasts and schedules

Interaction Optimizer does not forecast or schedule the following:
- Outbound interactions (that is, Interaction Dialer)
- Work items (that is, Interaction Process Automation)
- Calls placed on behalf of a workgroup, because these are not ACD interactions

Workgroups

The following limitations apply to workgroups and Interaction Optimizer:
- Interaction Optimizer does not take workgroup activation into account when scheduling.
- Interaction Optimizer only looks at media utilization at the workgroup level.
- Changing (that is, renaming, adding, deleting, etc.) workgroup(s) can "invalidate" historic ACD data in terms of its usefulness and/or availability in forecasting.
- Historic ACD data generated by CIC 4.0 SU5 or later is usable in Interaction Optimizer even if the Interaction Optimizer feature license was not in place.

Views

The number of open resource-intensive Interaction Optimizer views IC Business Manager should be limited (a maximum of 3-5). Schedule creation and modification, as well as intraday reforecasting, can be especially resource intensive. The larger the scheduling units the more resource intensive (memory, CPU, and network bandwidth) the views.

Skills

The following limitations apply to skills and Interaction Optimizer:
- Skills must be assigned prior to the interaction entering the workgroup and must not change after assignment.
- The skill set captured for interactions is limited to 50 characters (alphabetical ordered, pipe-separated (|)) by StatServer. If truncation occurs, only complete skills will be written.
- Historic ACD data, prior to applying the Interaction Optimizer feature license, is not usable by Interaction Optimizer.
- Changing (that is, renaming, adding, deleting, etc.) and/or skill(s) can "invalidate" historic ACD data in terms of its usefulness and/or availability in forecasting.

Queues

Use of flow-out queues will inflate the forecast need and resources as an interaction overflowing from queue 1 to queue 2 will be counted as an offered interaction for both queues.

Scheduling unit naming conventions

Scheduling unit names cannot have any of the following characters: /, \, |, &, ', ^, =, +.

Agent Feature Matrix

The following feature matrix shows what features, from an agent's perspective, are available in Interaction Desktop, the Interaction Optimizer standalone web application, and Interaction Connect. Parts of this matrix are static—no plans exist to offer additional features in either Interaction Desktop or the Interaction Optimizer standalone web application.

Feature	Interaction Desktop	Embedded Web Applications in Interaction Desktop	Interaction Optimizer Standalone Web Application	Interaction Connect
Accrual information	No	Yes	Yes	Yes
Activity reminders	Yes	Yes	No	Yes
Schedule bidding	Yes	Yes[1]	No	No
Schedule preferences	Yes	Yes[1]	No	No
Shift trading	No	Yes	Yes	Yes
Time off requests	Yes	Yes	Yes	Yes
View schedule	Yes	Yes	Yes	Yes

[1] Schedule bidding and schedule preference functionality in this scenario is provided via separate Interaction Desktop modules and accessible via Interaction Desktop top-level menus.

Change Log

Date	Changes
28-April-2017	Removed mention of Interaction Client .NET Edition.
14-September-2017	Rebranded for Genesys
09-February-2018	HTML5 project conversion edits
11-June-2018	Updated limitations in workgroups topic.
24-October-2018	In Agent Feature Matrix, added column for Interaction Connect. Renamed Standalone and Embedded columns to Embedded Web Applications in Interaction Desktop and Interaction Optimizer Standalone Web Application.
06-September-2019	Updated configuration scale information to include option to view operating limits in Interaction Optimizer.
19-September-2019	Added Software requirements topic.