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/cic.

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# Table of Contents

Table of Contents................................................................. 2
Interaction Optimizer configuration scale................................... 3
Concurrent licensing support.................................................. 4
Hardware requirements.......................................................... 5
  Recommended requirements.................................................. 5
Interaction Optimizer supported configuration and limitations........ 6
  Workforce environments..................................................... 6
  Forecasts and schedules..................................................... 6
  Workgroups........................................................................ 6
  Views.................................................................................. 6
  Skills.................................................................................. 6
  Queues.............................................................................. 6
  Scheduling unit naming conventions...................................... 7
Agent Feature Matrix................................................................... 8
Change Log.................................................................................. 9
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.

Scheduling units with more than 500 agents should be broken up into smaller scheduling units.

<table>
<thead>
<tr>
<th>Category</th>
<th>Scope</th>
<th>Limit</th>
<th>Enforced</th>
<th>Warning</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents</td>
<td>Scheduling unit</td>
<td>500</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Workgroups</td>
<td>Scheduling unit</td>
<td>50</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Staffing groups</td>
<td>Schedule</td>
<td>50</td>
<td>No</td>
<td>No</td>
<td>Unique 'workgroup(s) + media type(s) + skill set' combination amongst agents</td>
</tr>
<tr>
<td>Route groups</td>
<td>Short-term forecast or schedule</td>
<td>100</td>
<td>No</td>
<td>No</td>
<td>Unique 'workgroup + media type + skill set' combination</td>
</tr>
</tbody>
</table>

Note:
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.
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/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)
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: /, \, |, , &apos; ^, =, +.
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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Interaction Desktop</th>
<th>Embedded Web Applications in Interaction Desktop</th>
<th>Interaction Optimizer Standalone Web Application</th>
<th>Interaction Connect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accrual information</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Activity reminders</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Schedule bidding</td>
<td>Yes</td>
<td>Yes $^1$</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Schedule preferences</td>
<td>Yes</td>
<td>Yes $^1$</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Shift trading</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Time off requests</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>View schedule</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

$^1$ Schedule bidding and schedule preference functionality in this scenario is provided via separate Interaction Desktop modules and accessible via Interaction Desktop top-level menus.
<table>
<thead>
<tr>
<th>Date</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-September-2017</td>
<td>Rebranded for Genesys</td>
</tr>
<tr>
<td>09-February-2018</td>
<td>HTML5 project conversion edits</td>
</tr>
<tr>
<td>11-June-2018</td>
<td>Updated limitations in workgroups topic.</td>
</tr>
<tr>
<td>24-October-2018</td>
<td>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.</td>
</tr>
</tbody>
</table>