

Education Services

Instructor-Led Technical Course Offering



Interaction Optimizer[®] Deployment and Administration

Course Overview

Course Duration: 5 days (Mon – Thurs 8:30am – 5:00pm, Fri 8:30am – 4:00pm)

This course prepares students to be successful in the deployment, configuration, schedule creation and maintenance of Interaction Optimizer.

During this 5-day class, students will receive hands-on experience configuring the Interaction Optimizer component software while using a customer-based implementation scenario throughout the course. Students will work through hands-on labs to create sample schedules and learn how to work with the input parameters, volume and headcount forecasts to achieve acceptable schedules.

Students will also gain exposure to the Real Time Adherence module in Interaction Supervisor[™].

Note: Students will be required to demonstrate successful completion of course objectives by passing various certification examinations during the class. *Students who fail to complete course objectives, who miss a significant portion of the class, or who do not obtain a passing score on the certification exams will not be awarded a course certificate. These students must re-take the entire exam to be certified.*

Completion of the IC Administration for Operations course is strongly recommended for students who will be administering the IC system, including Interaction Optimizer.

Intended Students

This is a technical class. This class is recommended for the person(s) that fills the role of:

- **Workforce Manager, Forecast Analyst, Scheduling Administrator, Performance Analyst:** Contact center schedulers or those who have managerial responsibilities for shift and/or contact center personnel management.
- **Contact Center Supervisor:** Individuals who are responsible for agent productivity monitoring and schedule adherence.
- **Interaction Center Administrators:** Those responsible for management of the IC platform who will manage the technical aspects of Interaction Optimizer.

Course Objectives

This course will prepare the student to perform the following tasks:

- Describe workforce optimization best practices
- Configure daily and weekly shift definitions within Scheduling Units
- Configure agent activities
- Work with volume and headcount forecasts
- Generate and modify schedules
- Publish a final schedule
- Work with the individual agent schedule viewer plug-in
- Describe the statistics available in the Real Time Adherence monitor and how to work with them

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www.inin.com/education

or e-mail education@inin.com

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Course Agenda

- Introduction to Workforce Management concepts
- High Level Overview of Interaction Optimizer
- Conceptual introduction to Scheduling Units, Shift Definitions and Forecast Groups
- Data Worksheets, Interaction Administrator® Client Component Install, Miscellaneous Configuration
- Discuss Interaction Optimizer Administration
- Scheduling Units, Shift Definitions, Agent Configurations
- Forecasting
- Volume Forecasting, Headcount Forecasting
- Time Off Requests
- Agent Time Off Requests
- Schedule Administration
- Applying Time Off Requests
- User Schedules
- Real time Adherence
- Reporting
- Creating, editing and viewing a schedule
- Optimizer Deployment Methodology

Course Prerequisites

Interactive Intelligence® requires payment (either via program voucher or credit card) and a signed Partner Agreement or Non-Disclosure Agreement on file from the student's company before attendance.

To maximize the student's potential for successful course completion and certification, each student is expected to:

- Have a current *intermediate knowledge** of the Windows 2000/2003 interface and familiarity with its terminology.
- Be fluent in spoken and written English language.**
- Be designated as the scheduler or scheduling administrator for the contact center using the Interaction Center Platform.
- Have hands-on experience with computer software.
- Completion of the Interaction Center Administration for Operations class is strongly recommended.

**Intermediate knowledge* is defined as the ability to: Use Windows Explorer interface to cut, paste, copy files; add or connect to network shares/drives; add, delete, and modify protocols; and navigate throughout the entire operating system interface without instruction.

**The course materials, lab materials, and lectures are delivered in English. In order to benefit from the instruction, all students must be fluent in the English language.

Additional Training Opportunities

- Students desiring a better understanding of the configuration options available for Interaction Center should attend the **Interaction Center Administration** course.
- Students desiring a better understanding of Reporting should attend the **Interaction Center Reporting Web-based Workshop** course.
- The **Online Passport** is recommended for all partners and customers of Interactive Intelligence.

Visit our website at www.inin.com/education to register.

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