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Outbound Contact Deployment Guide

Installing on Windows

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The Genesys Outbound CD contains the installation packages for the OCS and OCM applications. The CPD Server installation package is located on the Genesys Outbound CPD Server CD.

The setup files for these components are located in the following folders:

- OCM: \\solution_specific\outbound_contact_mgr\windows

Note:

The OCM release 7.6.x is packaged with Outbound Contact 8.1.

- OCS: \\solution_specific\outbound_contact_server\windows
- CPD Server: \\solution_specific\cpd_server\windows

If you downloaded Outbound Contact from an FTP site, the installation package is contained in a ZIP file and you must extract it using the WinZip utility. After you extract the files, the setup files for the applications will be in the Windows folder.

Installing OCS on Microsoft Windows 2003 or 2008

Note:

The OCS Application object must already be configured before you begin the installation.

Start

1. From the product CD, open the following folder:
solution_specific\outbound_contact_server\windows and run setup.exe

Note:

If you are installing a new version of the same release, you will need to select Install new instance of the application as the Setup Type.

2. If you are setting up client-side port configuration for the initial connection to Configuration Server, select the Use Client Side Port check box and then specify the following parameters:
 - Port--Enter the port number for the client, as preconfigured on your firewall. (This is not the Listening port of the OCS application.)
 - IP Address--Enter the IP Address of the computer on which you are installing and running the OCS application.

Notes:

- After selecting this option, the installation process will add the necessary command line arguments -transport-address and -transport-port) for connecting to Configuration Server at the application startup.
- In IPv6 deployments, you cannot set the IP address of the host--only IPv4 addresses can presently be set for the host. Therefore, *do not* try to specify the IP address of the host.

OCS will use the host name in the URI.

3. Enter the host name, port, username and password of the Configuration Server.
4. Select the Application object that you created in Genesys Administrator.
5. Select the license options:
 - License Manager--Enter the port and name for the license server.
 - License File--Use the Browse button to locate the license file.
6. To select the destination directory, either click Next to accept the default (displayed) or click Browse to locate another directory.
7. Click Install to start the installation.
On Windows operating systems, all servers are installed as services. Therefore, during installation, you will not be asked whether you want to install OCS as a Windows service. See [Using Windows Services](#), for more information.
8. Click Finish to complete the installation.

End

Tip

To maximize OCS performance, Genesys recommends that you set the power profile of your Windows operating system to **High Performance**.

Installing CPD Server on Microsoft Windows 2003 or 2008

CPD Server is an optional application.

Notes:

- It is not advisable to mix board technologies.
- Do not use different protocols (such as ISDN and Melcas) in one box.
- The CPD Server Installation Wizard may not recognize that the Dialogic drivers had been already installed if its version is different from the version of the drivers that are packaged on the Genesys CPD Server CD.
- CPD Server supports only the Dialogic drivers (for Service Release 6) that are provided on the CPD Server CD.

Start

1. From the product CD, open the following folder:
solution_specific\cpd_server\windows and run setup.exe

2. As the Maintenance Setup Type, select either Install new instance of the application or Maintenance of the existing installation.
3. Select Call Progress Detection Server as the component to install.
4. If you are setting up client-side port configuration for the initial connection to Configuration Server, select the Use Client Side Port check box and then specify the following parameters:
 - Port--Enter the port number for the client, as preconfigured on your firewall. (This is not the Listening port of the CPD Server application.)
 - IP Address--Enter the IP Address of the computer on which you are installing and running the CPD Server application.

Note:

After selecting this option, the installation process will add the necessary command line arguments (-transport-address and -transport-port) for connecting to Configuration Server at the application startup.

5. Enter the host name, port, username, and password of Configuration Server.
6. Select the license options:
 - License Manager--Enter the port and name for the license server.
 - License File--Use the Browse button to locate the license file.
7. To select the destination directory, either click Next to accept the default (displayed) or click Browse to locate another directory.
8. Click Install to start the installation.

On Windows operating systems, all servers are installed as services. Therefore, you will not be asked whether you want to install CPD Server as a Windows service. For more information, see [Using Windows Services](#).
9. Click Finish to complete the installation.

End

Installing CPD Proxy Server on Microsoft Windows 2003 or 2008

CPD Proxy Server is an optional application. CPD Proxy installation does not require Dialogic hardware to be installed on the target computer. **Start**

1. From the product CD, open the following folder:
solution_specific\cpd_server\windows
2. As the Maintenance Setup Type, select either Install new instance of the application or Maintenance of the existing installation.
3. Select Call Progress Detection Proxy as the component to install.
4. If you are setting up client-side port configuration for the initial connection to Configuration Server, select the Use Client Side Port check box and then specify the following parameters:
 - Port--Enter the port number for the client, as preconfigured on your firewall. (This is not the Listening port of the CPD Proxy Server application.)
 - IP Address--Enter the IP Address of the computer on which you are installing and running the CPD Proxy Server application.

Note:

After selecting this option, the installation process will add the necessary command line arguments (-transport-address and -transport-port) for connecting to Configuration Server at the application startup.

5. Enter the host name, port, username, and password of the Configuration Server.
6. Select the Application object that you created in Genesys Administrator.
7. To select the destination directory, either click Next to accept the default (displayed) or click Browse to locate another directory.
8. Click Install to start the installation.

On Windows operating systems, all servers are installed as services. Therefore, during installation, you will not be asked whether you want to install CPD Proxy Server as a Windows service. See [Using Windows Services](#) for more information.

9. Click Finish to complete the installation.

End

Real-Time and Historical Reporting

The *Reporting Technical Reference Guide* describes the Reporting templates.

For information about importing templates, refer to the following resources:

- *Reporting 7.5 CCPulse+ Help*, "Using the Import/Export Utility"
- *Reporting 7.2 Data Modeling Assistant Help*, "Importing and Exporting Templates"

For information about actions the user should take if the CCPulse+ Import/Export Utility is disabled, refer to the *Reporting 7.5 CCPulse+ Administrator's Guide*.

Using Windows Services

An application that is set up as a Windows Service starts automatically when the computer is started and runs in the background, without a console window.

Stopping or Modifying the Startup Type for an Application Running as a Windows Service

Start

1. On the Windows taskbar, click Start and then select Control Panel > Administrative Tools > Services.
2. Double-click the application to open its Property dialog box window.
3. Under Service Status, click the appropriate button to change the operational status of the service.
4. From the Startup type drop-down list, select the desired startup type.
5. Click Apply.

End