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Outbound Contact Deployment Guide

Multiple Sites, Users, and Tenants

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Multi-Sites

Outbound Contact Server supports multi-site operation. *Multi-site operation* means that you can run several dialing sessions for Campaigns independently in different locations using only one Outbound Contact Server, or you can run one dialing session from different sites at the same time. A site is a location with a contact center and an agent group.

OCS also supports environments in which agent groups or place groups are distributed across multiple sites. In this scenario, dialing is performed by one CPD Server or T-Server. OCS relies on ISCC call distribution to deliver successful calls to agents in multiple sites. If the value of the `transfer_to_unknown_dn` option is set to true or yes, OCS correctly processes the route of successful outbound calls or transfer calls between agents on different switches.

Note:

The use-data-from option must be configured with the value `consult-user-data` in the extrouter section of all T-Servers used with OCS. This value enables OCS to correctly process transferred calls between agents/DNs on different switches. When this value is set, AttributeUserData and AttributeConnID values are identified from the consultation call before the transfer or conference is completed. After the transfer or conference is completed, the EventPartyChanged message is generated, and then the AttributeUserData and AttributeConnID values can be taken from the original call.

If a Voice Transfer Destination DN and a T-Server, used as a Dialer, belong to one switch in a multi-site environment, but the call is distributed by external routing to an agent who is on a different site, at least one queue from this site must be listed in the Origination DN list of the corresponding Campaign Group. This forces OCS to register regular DNs on the remote site and receive related events.

In multi-site scenarios, OCS generates statistical user events only on the Communication DN that is configured under the same Switch object as the Voice Transfer Destination DN.

OCS makes multi-site operation possible because it connects to the T-Server at each site and tracks the campaign data that is assigned to each agent group at each site.

One example of a multi-site campaign is as follows: A customer has three sites with agents at each site. One campaign is assigned to three agent groups and runs concurrently at all three sites.

Multi-site does not *necessarily* mean that a dialing session for a Campaign Group is started at one site from which calls are distributed to agents in one of three sites; however, with a centralized CPD Server, it is possible to run a dialing session for a campaign from the central location and connect to agents who are at outlying sites.

Multiple Users

OCS can support multiple instances of Genesys Administrator or Outbound Contact Manager that run concurrently.

Multi-Tenant Environment

A *tenant* is typically a contact center (single-site or multi-site). In a multi-tenant site, the administrator can grant permissions to other users to view their own tenant and run their own campaigns. Outbound Contact supports multiple tenants. However, Genesys Administrator (Outbound) works with only one tenant at a time.

Genesys Administrator supports the Environment tenant, which can be used by administrators of multi-tenant sites or by a user with permission that is granted by an administrator. When multiple tenants are set up, an administrator can select any tenant, including the Environment tenant, from the Select Tenant dialog box. The Select Tenant dialog box displays the tenants that are available to each user, based on that user's permissions.

The Environment tenant is created during the installation of the Configuration Layer. Although the Environment tenant is on the same level as all other tenants in the directory, it provides the administrator of a multi-tenant site with the following:

- A single location for all the configuration objects that are shared by sub-tenants (for example, Applications, Application Templates, and so on).
- Preset templates in some folders (for example, the Formats folder includes a preset format).
- Privacy through restricted access to all users except the administrator.

The elements of the Environment tenant simplify the process of adding new tenants.

Centralized Configuration and Shared HMP Resources

In release 7.6.101 and higher, Outbound Contact supports a centralized configuration and sharing of HMP resources in multi-tenant deployment. This functionality can be used for HMP deployment in the ASM mode and the Transfer mode because of rapid ISCC call routing between SIP Servers.

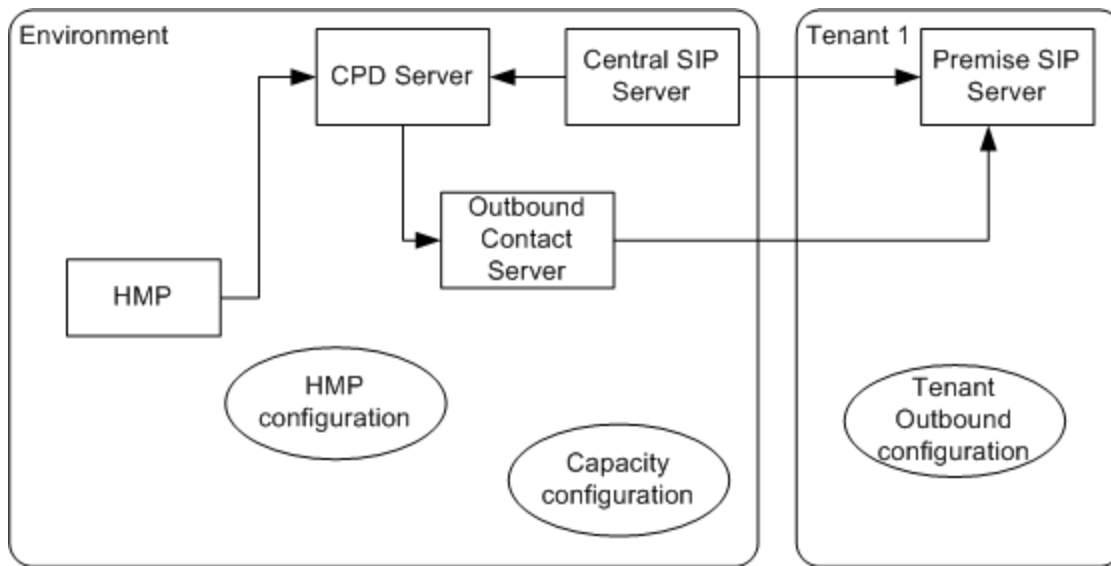
This functionality includes the ability to:

- Have a centralized configuration of HMP in a multi-tenant environment.
- Share HMP resources among multiple Tenants.
- Isolate HMP configuration from Tenant access.
- Configure a capacity-based resource allocation. (This configuration involves dedicating one CPD Proxy Server for each Tenant or any subset of Outbound Campaigns in a Tenant, as described in [Managing Dialing Resources](#).)
- Configure a demand-based resource allocation. (This configuration is based on one CPD Server shared among all Tenants.)

Configuration Requirements:

- All configuration of HMP must be accomplished under Environment/SIP switch and is not accessible by Tenants.
- The Tenant configuration contains only Outbound/agent-specific configurations.

The following figure provides a sample architecture of this configuration environment.



Sample Architecture

Note:

The preceding figure does not show component connections. Be aware that CPD Proxy Server, which is used by the Tenant and connects OCS with CPD Server, is configured under Environment. The Tenant is not able to change its configuration.

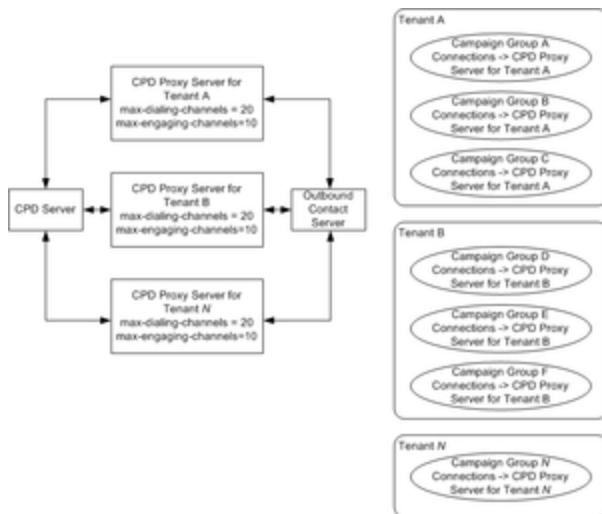
Managing Dialing Resources

To restrict the number of dialing resources available for each Tenant or for any subset of Outbound Campaigns in a Tenant:

- Configure CPD Proxy Server that controls the usage of dialing resources:
 - One for each Tenant that is used by all Campaign Groups for that Tenant, or
 - Multiple CPD Proxy Servers, one for each subset of Outbound Campaigns for the Tenant. For example, CPD Proxy Server 1 may have a maximum of 30 channels to handle Campaign A and B. CPD Proxy Server 2 might have a maximum of 50 channels to handle Campaigns C, D, and E.
- For each CPD Proxy Server, configure the **max-dialing-channels** option and the **max-engaging-channels** option, which set the maximum number of dialing and engaging channels for that CPD Proxy Server.

When OCS starts a dialing session for a Campaign Group, it requests and receives the maximum number available for these respective channels from CPD Proxy Server, as configured in these options.

The following figure illustrates how restricted dialing resources might be configured for two or more Tenants.



Dialing Resources for Tenant Campaigns

Dialing and Distribution of Engaging Calls

When OCS is running a dialing session associated with a campaign for a particular Tenant, it sends requests to make transfer calls (for HMP Transfer mode) or make engaging calls (for HMP ASM mode) to the Route Point under Environment SIP switch, instead of the Voice Transfer Destination (VTD) on the Tenant SIP switch that is associated with a specific Campaign Group. A routing strategy (loaded on the Route Point)/URS routes these calls to the VTD under the Tenant SIP switch.

This two step process is required because CPD Server cannot manage calls across multiple switches. By using this method, CPD Server works with the Environment/SIP switch only and OCS works with the premise SIP Servers only.

Note:

For additional information about configuring SIP Server to make transfers to external DNs, see the "Multi-Site Support" chapter in the *Framework SIP Server Deployment Guide*.

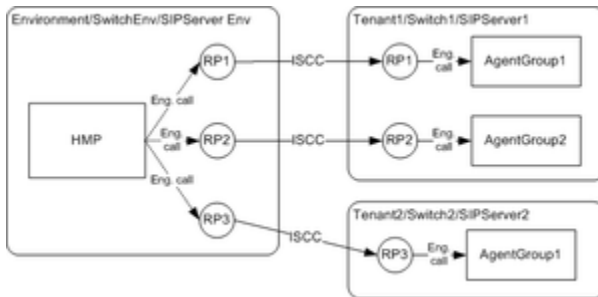
To accomplish this:

- For every VTD on the Tenant (premise) SIP switch, configure a corresponding Voice Transfer Destination on Environment SIP switch.
- Configure at least one Trunk Group DN for each Tenant to handle engaging calls.
- Create a routing strategy for each Environment/SIP Switch Route Point to route calls to the associated Route Point (VTD) on the Tenant switch.
- Configure the **vtd-override** option to specify the dialing number that OCS sends to CPD Server and that it will use as the destination number where a transfer call (HMP Transfer mode) or an engaging call (HMP ASM mode) is delivered.

Two Tenant Configuration Example

The following figure provides an example of a two Tenant configuration for handling engaging call

distribution in HMP ASM mode.



Engaging Call Dialing and Distribution Diagram

In this configuration:

- Tenant1 includes the following:
 - Switch1, SIPServer1, two Campaign Groups (CampaignGroup1 and CampaignGroup2), and two Agent Groups.
 - Two route points, as VTD.
 - One external route point for the switch used by that Tenant (not shown in the preceding figure).
- Tenant2 includes the following:
 - Tenant2 has Switch2, SIP Server2, one Campaign Group (CampaignGroup3), and one agent group.
 - One route point as the VTD.
 - One external route point (not shown in the preceding figure).
- The Environment SIP switch DNs includes the following:
 - Three route points. Two route points are the central VTDs for the two Campaign Groups for Tenant1. The third route point is the central VTD for the Campaign Group for Tenant2.
 - Two Trunk Group DNs for transferring engaging calls to premise SIP Servers.