

GENESYS[®]

This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Outbound Contact Deployment Guide

Outbound Deployment Planning Worksheet

5/9/2025

Outbound Deployment Planning Worksheet

This planning worksheet provides a single place in which to record the information that is required to configure and install Outbound Contact. The cells on the worksheet provide room to write additional values. After it is completed, the planning worksheet expedites the installation and configuration process. It serves as a "look-up" sheet for critical information that you will need in order to complete the process. The information about the items in the Sample Planning Worksheet is important to have on hand.

Sample Planning Worksheet

The following table is a sample planning worksheet in which to record information that you need to have on hand during the configuration process.

T-Server(s)

	Name	ltem	ltem	ltem	ltem		
Logging In to Genesys Administrator							
1.	User name						
2.	User password						
3.	Application						
4.	Host						
5.	Port						
License Manager							
6.	Path to License Manager						
Outbound Solution	Object						
7.	Name						
Tenant							
8.	Names						
Switches							
8.	Name(s)						
9.	Type of switch						

Planning Worksheet

10.	Internal or External CPD capability		
11.	T-Server connected to each switch (one-to-one relationship)		
12.	Special DNs.19for example, Communication DN and Overflow DN		
DNs			
13.	ACD positions		
14.	Extensions		
15.	Call processing Ports (CPP)		
16.	ACD Queues		
17.	Routing Points		
18.	Virtual Queues		
19.	Communication DNs		
20.	Trunk Group DNs (for Outbound-IP dialing modes)		
20.	Note: For more information, see Outbound VoIP Deployment.		
Applications			
21.	T-Server name(s)		
22.	Host		
23.	Port		
24.	Back-up		
25.	Designated switch (one-to- one relationship)		
Stat Server(s)			

26.	Stat Server name(s)			
27.	Host			
28.	Port			
29.	Back-up server			
DB Server				
30.	DB Server name(s)			
31.	Host			
32.	Port			
33.	Back-up server			
34.	Options (see Database Access Point(s).)			
35.	DBMS type			
Outbound Cont	act Server (OCS)		
36.	OCS name			
37.	Host			
38.	Communication port			
39.	Back-up server			
39.	Name(s) of T- Server(s) to which OCS connects			
40.	Name of Message Server to which OCS connects (optional)			
CPD Server				
41.	CPD Server name(s)			
42.	Host			
43.	Communication Port			
44.	Back-up server for CPD Server			
45.	Name of T- Server to which CPD Server connects			
46.	Type of			

	Dialogic board(s)				
47.	DTI Ports (DNs for Dialogic board). (See DNs, near the top of the table, starting at row 13.)				
Genesys Admin	nistrator				
48.	Genesys Administrator name (application)				
49.	Name of OCS to which Genesys Administrator connects				
Objects					
Database Acces	ss Point(s)				
50.	Name				
51.	DB Server name. (See row 30.)				
52.	DB Server host. (See row 31.)				
53.	DB Server communication port. (See row 32.)				
54.	DBMS name				
55.	DBMS type. (See row 35.)				
56.	Database name				
57.	User name for login to DB				
58.	Password for login to DB				
59.	Case Conversion				
User-Defined Fields					
60.	Name				

61.	Data type		
62.	Length		
63.	Default value (optional)		
Formats			
64.	Name		
65.	User-defined field names. (See above.)		
Table Access			
66.	Name		
67.	Table type		
68.	DB Access Point name. (See row 50.)		
69.	Format name. (See row 64.)		
70.	Database table name		
Dialing Filters			
71.	Name(s)		
72.	Criteria SQL statement		
73.	Order by SQL statement		
Treatments			
74.	Name		
75.	Call result		
76.	Apply to record		
77.	Apply to call		
78.	Destination DN (if "Apply to call")		
79.	Number in sequence		
80.	Cycle attempt (only for redial)		
81.	Interval		
82.	Increment		
83.	Date/Time		
84.	Range		

Caling Lists85.NameImage Property86.Table Access Point nameImage Property87.Daling filter nameImage Property88.Script property (optional)Image Property89.Script property (optional). (See Treatment names)Image Property90.NameImage Property91.Calling list name(s)Image Property92.List weight (if more than one list)Image Property93.Session TypeImage Property94.Session TypeImage Property95.Daling modeImage Property96.Session TypeImage Property97.Optimization PropertyImage Property98.Session TypeImage Property99.Session TypeImage Property91.Session TypeImage Property92.Session TypeImage Property93.Session TypeImage Property94.Session TypeImage Property95.Daling modeImage Property96.Session TypeImage Property97.Optimization Colfiniation Drive PropertyImage Property98.Suffer Size Optimization Colficient Drive PropertyImage Property99.Suffer Size Optimization Colficient Optimization Optimization Optimization Optimization Optimization Optimization Optimization Optimization Optimization Optimization Optimization Optimization Optimization						
86.Table Access Disint nameIndex ImageImageImage87.Diame DisponationImageImageImage88.Script property (optional).ImageImageImage89.Script property (optional).ImageImageImage89.Script property (optional).ImageImageImage80.Script property (optional).ImageImageImage80.Script property (optional).ImageImageImage90.NameImageImageImageImage91.Calling list more than one list?ImageImageImage92.Session typeImageImageImageImage94.Session typeImageImageImageImage94.Session typeImageImageImageImage94.Session typeImageImageImageImage95.Dialing modeImageImageImageImage96.Serion to (Origination DVF in provious releaseseImageImageImage97.Suffer Size OptimalImageImageImageImage98.Suffer Size OptimalImageImageImageImage99.Suffer Size OptimalImageImageImageImage90.Suffer Size OptimalImageImageImageImage90.Suffer Size OptimalImage <td colspan="6">Calling Lists</td>	Calling Lists					
ab.Point nameImageImageImageImage87.00Caling filter (optional)CarlosImageImage88.00Script property (optional). (see interaturets.)ImageImageImage89.00Treatment (optional). (see interaturets.)ImageImageImage90.00NameImageImageImageImage91.00NameImageImageImageImage91.00Caling list inter than one listImageImageImageImage92.00Session typeImageImageImageImageImage93.00Session typeImageImageImageImageImage94.00Session typeImageImageImageImageImage94.00Session typeImageImageImageImageImage94.00Session typeImageImageImageImageImage95.00Session typeImageImageImageImageImage96.00Session typeImageImageImageImageImage97.00Session typeImageImageImageImageImage98.00Session typeImageImageImageImageImage99.00Session typeImageImageImageImageImage99.00Session typeImageImageImageImageImage99.00	85.	Name				
87.name (optional)Image (optional)Image (optional)88.Script property (optional)Image (optional)Image (optional)Image (optional)89.Treatment (optional)Image (optional)Image (optional)Image (optional)Image (optional)Campaigne Image (optional)Image (optional)Image (optional)Image (optional)Image (optional)90.Name (amage(s)Image (optional)Image (optional)Image (optional)Image (optional)91.Calling list more than one listImage (optional)Image (optional)Image (optional)Image (optional)92.Ession more than one listImage (optional)Image (optional)Image (optional)Image (optional)93.Session type (optional) mene(s)Image (optional)Image (optional)Image (optional)Image (optional)94.Session type (optional) (optignation (Provignation (Pro	86.					
ab.(optional)(opt	87.	name				
89.names coptional) (see coptional) (see coptional) (see coptional) (see coptional)Image: second secon	88.	Script property (optional)				
90.NameIdentityIdentityIdentity91.Calling list name(s)IdentityIdentityIdentity92.List weight (if more than one) list)IdentityIdentityIdentity92.List weight (if 	89.	names (optional). (See				
90.NameIdentityIdentityIdentity91.Calling list name(s)IdentityIdentityIdentity92.List weight (if more than one) list)IdentityIdentityIdentity92.List weight (if 	Campaigns					
91.name(s)92.List weight (if more than one list)all all all all all all all all all all		Name				
92.more than one list)more than one list)list)list) Campaign Group 93.Session typeImage of the session typeImage of the session type94.Session typeImage of the session typeImage of the session type95.Dialing modeImage of the session typeImage of the session type96.Voice Transfer Destination Destination Destination Ner leases)Image of the session type97.Optimization eleases)Image of the session typeImage of the session type98.Target valueImage of the session typeImage of the session type99.Suffer size optimal minimumImage of the session typeImage of the session type100.Suffer size optimal of the session typeImage of the session typeImage of the session type101.PD Server ame (if more typeImage of the session typeImage of the session type102.CPD Server ame (if more type)Image of the session typeImage of the session type102.CPD Server ame (if more type)Image of the session typeImage of the session type102.Server ame (if more type)Image of the session typeImage of the session type103.Server ame (if more type)Image of the session typeImage of the session type104.Server ame (if more type)Image of the session typeImage of the session type105.Server ame (if more type)Image of the session typeImage of type1	91.	Calling list name(s)				
93.Session name(s)Image of the session session session stypeImage of the session session stypeImage of the session 	92.	more than one				
93.Session name(s)Image of the session session session stypeImage of the session session stypeImage of the session session session95.Dialing modeImage of the session operation DN" in previous releases)Image of the session session sessionImage of the session session session session session session session session session session operation methodImage of the session sessionImage of the session session sessionImage of the session sessionImage of the session session97.Optimization methodOptimization sessionImage of the sessionImage of the sessionImage of the session97.Optimization methodOptimization sessionImage of the sessionImage of the sessionImage of the session98.Target valueImage of the session coefficient minimumImage of the sessionImage of the sessionImage of the session99.Suffer size coefficient optimalImage of CPD sortsImage of the sessionImage of the sessionImage of the session101.Number of CPD sortsImage of CPD sortsImage of the sessionImage of the sessionImage of the session102.CPD Server session optionalImage of the session sortsImage of the session sortsImage of the session sortsImage of the session sorts102.CPD Server session optionalImage of the session sortsImage of the session sortsImage of the session sortsImage of the session sorts <td>Campaign Grou</td> <td>a</td> <td></td> <td></td> <td></td> <td></td>	Campaign Grou	a				
94.Session typeImage of the size		Session				
95.Dialing modeImage: selection of the s	94.					
96.Destination Vorigination SeleasesImage: selection SeleasesImage: selection Seleases97.MethodImage: selection SelectionImage: selection SelectionImage: selection Selection98.Target valueImage: selection SelectionImage: selection SelectionImage: selection Selection99.Buffer size SelectionImage: selection SelectionImage: selection SelectionImage: selection Selection100.Buffer size SelectionImage: selection SelectionImage: selection SelectionImage: selection Selection101.Selection SelectionImage: selection SelectionImage: selection SelectionImage: selection Selection102.Selection SelectionSelection SelectionImage: selection SelectionImage: selection Selection102.Selection SelectionSelection SelectionImage: selection SelectionImage: selection Selection102.Selection SelectionSelection SelectionImage: selection SelectionImage: selection Selection102.Selection SelectionSelection SelectionImage: selection SelectionImage: selection Selection102.Selection SelectionSelection SelectionImage: selection SelectionImage: selection Selection102.Selection SelectionSelection SelectionSelection SelectionImage: selection Selection102.Selection SelectionSelection SelectionS	95.					
97.methodof an and an	96.	Destination ("Origination DN" in previous				
99.Buffer size coefficient minimumImage: Size coefficient optimalImage: Size coefficient optimalImage: Size 	97.	Optimization method				
99.coefficient minimumImage: Second Secon	98.	Target value				
100.coefficient optimalImage: Coefficient optimalImage: Coefficient optimalImage: Coefficient optimal101.Number of CPD portsCentor optimalCentor optimalCentor optimalCentor optimal102.CPD Server name (if more than one) (optimal)Centor optimalCentor optimalCentor optimal	99.	coefficient				
101.ports102.CPD Server name (if more than one) (optional)	100.	coefficient				
102. name (if more than one) (optional)	101.					
103. Script property	102.	name (if more than one)				
	103.	Script property				

	(optional)			
104.	Stat Server name			
105.	OBN Manager name (optional component)			
106.	Interaction Server (optional component)			
107	Trunk DNs (for Outbound-IP dialing modes) Note: For more information, see OutboundVoIPDeploym	ient.		
Reporting (Opt	ional)			
108.	Real-time reporting; if yes, see Reporting documentation.			
109.	Historical reporting; if yes, see Reporting documentation.			