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# Outbound Contact Deployment Guide

Outbound Deployment Planning Worksheet

4/2/2025

# 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)

**Planning Worksheet**

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

## Outbound Deployment Planning Worksheet

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|                       |  |  |  |  |  |
|-----------------------|--|--|--|--|--|
| 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  |  |  |  |  |
| <b>DNs</b>            |  |  |  |  |  |
| 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)<br><br><b>Note:</b> For more information, see <a href="#">Outbound VoIP Deployment</a> . |  |  |  |  |
| <b>Applications</b>   |  |  |  |  |  |
| 21.                   | T-Server name(s)   |  |  |  |  |
| 22.                   | Host   |  |  |  |  |
| 23.                   | Port   |  |  |  |  |
| 24.                   | Back-up  |  |  |  |  |
| 25.                   | Designated switch (one-to-one relationship)  |  |  |  |  |
| <b>Stat Server(s)</b> |  |  |  |  |  |

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|                                      |   |  |  |  |  |
|--------------------------------------|---|--|--|--|--|
| 26.                                  | Stat Server name(s)                                     |  |  |  |  |
| 27.                                  | Host  |  |  |  |  |
| 28.                                  | Port  |  |  |  |  |
| 29.                                  | Back-up server  |  |  |  |  |
| <b>DB Server</b>                     |   |  |  |  |  |
| 30.                                  | DB Server name(s)                                       |  |  |  |  |
| 31.                                  | Host  |  |  |  |  |
| 32.                                  | Port  |  |  |  |  |
| 33.                                  | Back-up server  |  |  |  |  |
| 34.                                  | Options (see Database Access Point(s).)                 |  |  |  |  |
| 35.                                  | DBMS type   |  |  |  |  |
| <b>Outbound Contact Server (OCS)</b> |   |  |  |  |  |
| 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) |  |  |  |  |
| <b>CPD Server</b>                    |   |  |  |  |  |
| 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   |  |  |  |  |

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|                                 |   |  |  |  |  |
|---------------------------------|---|--|--|--|--|
|                                 | Dialogic board(s)   |  |  |  |  |
| 47.                             | DTI Ports (DNs for Dialogic board). (See DNs, near the top of the table, starting at row 13.) |  |  |  |  |
| <b>Genesys Administrator</b>    |   |  |  |  |  |
| 48.                             | Genesys Administrator name (application)  |  |  |  |  |
| 49.                             | Name of OCS to which Genesys Administrator connects   |  |  |  |  |
| <b>Objects</b>                  |   |  |  |  |  |
| <b>Database Access Point(s)</b> |   |  |  |  |  |
| 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   |  |  |  |  |
| <b>User-Defined Fields</b>      |   |  |  |  |  |
| 60.                             | Name  |  |  |  |  |

## Outbound Deployment Planning Worksheet

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|                        |  |  |  |  |  |
|------------------------|--|--|--|--|--|
| 61.                    | Data type                              |  |  |  |  |
| 62.                    | Length                                 |  |  |  |  |
| 63.                    | Default value (optional)               |  |  |  |  |
| <b>Formats</b>         |  |  |  |  |  |
| 64.                    | Name                                   |  |  |  |  |
| 65.                    | User-defined field names. (See above.) |  |  |  |  |
| <b>Table Access</b>    |  |  |  |  |  |
| 66.                    | Name                                   |  |  |  |  |
| 67.                    | Table type                             |  |  |  |  |
| 68.                    | DB Access Point name. (See row 50.)    |  |  |  |  |
| 69.                    | Format name. (See row 64.)             |  |  |  |  |
| 70.                    | Database table name                    |  |  |  |  |
| <b>Dialing Filters</b> |  |  |  |  |  |
| 71.                    | Name(s)                                |  |  |  |  |
| 72.                    | Criteria SQL statement                 |  |  |  |  |
| 73.                    | Order by SQL statement                 |  |  |  |  |
| <b>Treatments</b>      |  |  |  |  |  |
| 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                                  |  |  |  |  |

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| <b>Calling Lists</b>  |  |  |  |  |  |
|-----------------------|--|--|--|--|--|
| 85.                   | Name   |  |  |  |  |
| 86.                   | Table Access Point name  |  |  |  |  |
| 87.                   | Dialing filter name (optional)                                     |  |  |  |  |
| 88.                   | Script property (optional)   |  |  |  |  |
| 89.                   | Treatment names (optional). (See <a href="#">Treatments</a> .)     |  |  |  |  |
| <b>Campaigns</b>      |  |  |  |  |  |
| 90.                   | Name   |  |  |  |  |
| 91.                   | Calling list name(s)   |  |  |  |  |
| 92.                   | List weight (if more than one list)                                |  |  |  |  |
| <b>Campaign Group</b> |  |  |  |  |  |
| 93.                   | Session name(s)  |  |  |  |  |
| 94.                   | Session type   |  |  |  |  |
| 95.                   | Dialing mode   |  |  |  |  |
| 96.                   | Voice Transfer Destination ("Origination DN" in previous releases) |  |  |  |  |
| 97.                   | Optimization method  |  |  |  |  |
| 98.                   | Target value   |  |  |  |  |
| 99.                   | Buffer size coefficient minimum                                    |  |  |  |  |
| 100.                  | Buffer size coefficient optimal                                    |  |  |  |  |
| 101.                  | Number of CPD ports  |  |  |  |  |
| 102.                  | CPD Server name (if more than one) (optional)                      |  |  |  |  |
| 103.                  | Script property  |  |  |  |  |

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|                             |   |  |  |  |  |
|-----------------------------|---|--|--|--|--|
|                             | (optional)  |  |  |  |  |
| 104.                        | Stat Server name  |  |  |  |  |
| 105.                        | OBN Manager name (optional component)   |  |  |  |  |
| 106.                        | Interaction Server (optional component)   |  |  |  |  |
| 107                         | Trunk DN's (for Outbound-IP dialing modes)<br><br><b>Note:</b> For more information, see <a href="#">OutboundVoIPDeployment</a> . |  |  |  |  |
| <b>Reporting (Optional)</b> |   |  |  |  |  |
| 108.                        | Real-time reporting; if yes, see Reporting documentation.   |  |  |  |  |
| 109.                        | Historical reporting; if yes, see Reporting documentation.  |  |  |  |  |