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Outbound Contact Deployment Guide

Worksheet Definitions

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Worksheet Definitions

For more information about the following items, see "[Other Resources](#)".

Logging In to Genesys Administrator

- User name--Enter the user ID authorized to log in to Configuration Server.
- User password--Enter the password for the user ID authorized to log in to Configuration Server.
- Application--Enter the name of the Genesys Administrator Application object.
- Host--Enter the host name of the computer on which the Configuration Server is installed.
- Port--Enter the port that the Configuration Server uses for client connections.

License Manager

- Path to License Manager--Enter the path to the License Manager. License Manager must be available for licensed application.

Outbound Solution Object

- Name--Enter a name for the Outbound solution object.
- Solution Control Server--Enter an existing Solution Control Server.

Tenant

- Name(s)--If this a multi-tenant environment, enter the names of the tenant to be used for Outbound Contact.

Switches

As part of the Framework configuration and installation, you will have already assigned agent names, agent logins, and DNs (see DNs in the [Planning Worksheet](#)) to switches.

In most systems, the telephone directly notifies the switch when the telephone set (*te/eset*) status

changes--for example, when agents begin or end a call. By default, Outbound Contact registers teleset states internally. Older PBX software does not enable the teleset to notify the switch directly when its status changes. If the contact center's PBX software does not enable direct notification, you must customize the contact center's teleset state disposition. Use configuration settings that instruct Outbound Contact to send Framework's T-Server a notice for each teleset status change. For more information, see [Outbound Contact Configuration Options](#).

The following refer to the capabilities of a switch:

- Name(s)--A switch set up during Framework configuration. Other switches can include numbers and types of all telephony devices (DNs) to be monitored and controlled through the CTI (computer-telephony integration) link. Enter the switch name(s) to be used for Outbound Contact. If new switches are needed, they must be added through Framework.
- CPD capability--Does the switch have call-progress detection (CPD) capabilities? If the switch does not provide call-progress detection, and you wish to use CPD Server as a part of Outbound Contact for the contact center, collect the following information about the Dialogic boards:
 - Call transferring--Does the switch have this capability?
 - Call conferencing--Does the switch have this capability?
 - Call forwarding--Does the switch have this capability?
 - Do Not Disturb--Does the switch have this capability?

Special DNs

Communication DN

Outbound Contact reports on outbound activity by using a DN that is set up as a Communication DN.

- Number--Enter the name or number of the Communication DN.
- Type--Always enter "Communication DN".

Overflow DN

Outbound Contact monitors calls that cannot be handled by available agents. It does this through a DN set up as an Overflow DN.

- Existing DN name--Enter the name or number of the overflow DN.

Applications

Each application name must be unique, and it can contain alphanumeric characters and underscores. The properties for most applications are the same; therefore, definitions are given only once for the "Applications" section of the worksheet.

- T-server name(s)--Enter the name of the T-Server.
- Stat Server name(s)--Enter the name of the Stat Server.
- DB Server name(s)--Enter the name of the DB Server.
- OCS name--Enter the name of the Outbound Contact Server.
- CPD Server name(s)--Enter the name of the CPD Server.
- Genesys Administrator name--Enter the name of Genesys Administrator.
- Reporting--See the Reporting documentation.

Tenants

- Tenant name(s)--If this is a multi-tenant environment, select the name of the tenant.

Server Info

- Host--Select the host computer on which your application will be running.
- Communication port--Enter the port number that the application's clients will use to establish connections to the named server.
- Back up Server--Select the back up server to be contacted if connection to the primary server fails.

Options

- Option names--Options are changed according to the user's needs. For detailed information about options, see [Outbound Contact Configuration Options](#).

Database Access Point(s)

- Name--Enter the name of the Database Access Point (DAP) object.

Server Info

- DB Server name--Select the name of an existing DB Server.
- DB Server host--Select the host computer on which the DB Server will be running.

Tenants

- Tenant name(s)--If this is a multi-tenant environment, select the name of the tenant.

DB Info

- DBMS name--Select the name of the host computer on which the database resides.
- DBMS type--Select the type of database.
- Database name--Enter the name of the database.
- User name for login to DB--Enter the user name for accessing the database.
- Password for login to DB--Enter the password for access the database.

User-Defined Fields

A calling list must contain Genesys mandatory fields, and it can also contain user-defined fields. For more information about mandatory fields, see [Field Object](#) and [Format Object](#). The user must create additional fields, containing business information that is used for sorting and chaining records--for example, Last_Name.

- Name--Enter the name of the user-defined field--for example, cust_id.
- Data type--Enter the type of data, for example, the data type for cust_id would be int, and must always be numeric.
- Length--Enter the number of characters needed for field contents--for example, cust_id can be limited to five numeric characters.
- Default value (optional)--Enter the value that will be assigned to the field unless it is changed.

Formats

A *format* contains a collection of Genesys mandatory fields and user-defined fields. It defines the layout of a calling list. More than one format can be created and named for the specific needs of particular calling lists.

Identify the number of formats that you need, assign names to them, and identify the user-defined fields required for each.

Note:

Plan and create your formats and all custom fields carefully. You cannot modify existing fields or add new fields after the calling list table is created in Genesys Administrator.

- Name--Enter the name of format.
- User-defined field names--Enter the names of the user-defined fields to each format.

Table Access

- Name--Select the name of the Table Access object.
- Table type--Select "Calling List."
- DB access point name--Select the name of the database access point through which the table can be accessed.
- Format name--Enter the name of the format applied to this table.
- Database table name--Enter the name as specified in the database.

Dialing Filters

Dialing filters select records from a calling list for dialing, based on specified criteria. They can be created in Configuration Manager or in Genesys Administrator and stored in the Filters view in Genesys Administrator > Provisioning tab > Outbound Contact. For more information, see [Filter Object](#).

- Name--Enter the name of the dialing filter.
- Criteria SQL statement--Enter the SQL statements that give the criteria for the filter.
- Order by SQL statement--Enter the field on which the list will be sorted.

Treatments

Decide on treatments to use for unsuccessful call results. For more details and examples, see [Call Handling Treatments](#).

- Name--Enter the name of the treatment.
- Call result--Enter the result of dialing a calling list record.
- Apply to record--Enter the action to be applied to a calling list record, based on the call result.
- Apply to call (very limited use)--Enter the final outcome of attempts to dial a record.
- Destination DN (if "Apply to call")--Enter the DN to which a treatment will forward a call.
- Number in sequence--In a treatment sequence, each treatment contains a unique number that determines the order in which it will be applied to the same call result, on calls from the same calling list.
- Cycle attempt (only for redial)--Enter the maximum number of consecutive times that the treatment will be performed on the record.
- Interval--Enter the time interval, in minutes, that the application will wait between the first dialing attempt and the first treatment attempt, or between consecutive attempts.
- Increment--Enter the number of minutes that the application will add to the interval (see the previous item) after the first treatment attempt, and after each consecutive attempt.

- Date/Time--Enter the date/time when another treatment attempt will be performed.

Calling Lists

Calling lists contain dialing records. Decide where you will store the calling lists. They can be located either in the Genesys Configuration Database or in a separate database. The size of the calling lists and the ease of maintenance are the deciding factors when identifying the appropriate location. Very large calling lists should be maintained in a database other than the Genesys Configuration Database.

- Name--Enter the name of the new calling list.
- Table Access Point name--Enter the name of the Table Access object to which the calling list refers.
- Dialing filter name (optional)--Enter the name of default dialing filter to apply to the calling list.
- Script property--The Script property in the campaign, in the calling list, and in the Campaign Group defines the Script object, which contains all of the attributes that are required by Agent Scripting.

Treatments

- Treatment names (optional)--Identify or create treatments that will be applied to the records on the calling list if calls are unsuccessful.

Campaigns

Campaigns are collections of callings lists and agent or place groups. Agent skills that might be considered during the processing of customer interactions include language or marketing knowledge.

- Name--Enter the name of the campaign.
- Calling list name(s)--Enter the names of the calling lists to be used by each campaign.
- List weight (if more than one list)--Enter the percentage of call records to be retrieved from a calling list for a campaign. For more information, see *Framework Genesys Administrator Help*.

Campaign Group

- Group name(s)--Enter the names of the agent or place groups assigned to each campaign.
- Group type--Enter the type (agent or place) of each group assigned to each campaign.
- Dialing mode--Decide on a dialing mode to use as the default for the agent groups in a campaign. The dialing modes are Progressive, Predictive, Preview, Push Preview, and Power GVP.
- Voice Transfer Destination ("Origination DN" in previous releases)--Enter the queue or Routing Point to which a call is transferred after a "live" answer.

- Optimization method--Sets the default dialing optimization method for the Campaign Group and applies only to Predictive dialing mode.
- Target value--Enter the percentage value of the optimization method.
- Buffer size coefficient minimum--Enter the minimum number of chains per active agent that OCS can keep on hand for dialing.
- Buffer size coefficient optimal--Enter the optimal number of chains per active agent that OCS can keep on hand for dialing.
- Number of CPD ports--Enter the number of dialing ports that can be used for dialing on behalf of a Campaign Group. If you are using ASM mode, at least one port is required for each agent for the engaging calls, in addition to ports for outbound dialing.
- CPD Server name (if more than one)--Enter the name of the CPD Server to use for this Campaign Group.
- Script property--The Script property in the campaign, calling list, and Campaign Group defines the Script object, which contains all of the attributes that are required by Agent Scripting.

Note:

For an Outbound-IP environment, configure Trunk Group DNs on the Configuration tab/Advanced section. For more information, see [Outbound VoIP Deployment](#).

Reporting (Optional)

- Real-time reporting--If you install real-time reporting (CCPulse+), see also the *Reporting 8.0 Deployment Guide* and the *Reporting 8.0 CCPulse+ Administrator's Guide*.

Note:

You can also use CCPulse+ to view historical reports.

- CCPulse+ name--Enter the name of the CCPulse+ to be used.
- Stat Server name--Enter the name of the Stat Server to be used with CCPulse+.
- Historical reporting--If you install historical reporting (ICON and/or CCPulse+), see the *Reporting 8.0 Deployment Guide* and/or the *Interaction Concentrator Deployment Guide*.