Workspace Desktop Edition Deployment Guide

Outbound campaigns

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Outbound campaigns

[**Modified:** 8.5.115.17, 8.5.109.16, 8.5.106.19, 8.5.105.12, 8.5.102.06, 8.5.117.18, 8.5.125.04, 8.5.137.06, 8.5.145.06]

Workspace supports the following campaign types:

- **Preview**: Contacts are retrieved manually by the agent and dialed manually by the agent. These are low volume/high value campaigns, in which campaign calls are made by using a preset calling list for a specific campaign.
- **Push Preview**: Contacts are retrieved automatically by the campaign, but the agent dials the call manually. These are low volume/high value value campaigns, in which campaign calls are made by using a preset calling list. Agents are provided with a preview of the call, and then can either have the opportunity to accept it, or to reject it and return it to the top of the queue or discard the record.
- **Progressive**: Contacts are retrieved and dialed automatically by the campaign. These are low volume/high value campaigns, in which outbound calls are directed to the agent desktop.
- **Predictive**: Contacts are retrieved and dialed automatically by the campaign. These are high volume/low value campaigns, in which outbound calls are directed to the agent desktop.
- **Assured Connection**: This is a dialing mode for certain records in Progressive and Predictive campaigns. In this mode, an agent is engaged (connected) to the call prior to dialing the contact. For information about using Assured Connection in your campaigns, refer to the *Outbound Contact 8.1 Deployment Guide*. This mode is supported for SIP Campaigns only. [**Added:** 8.5.145.06]
- **Active Switching Matrix (ASM)**: Contacts are retrieved and dialed automatically by the campaign, like Progressive and Predictive, but the agent is connected immediately to the contact.

Warning

If you grant an agent voice capabilities and Instant Messaging (IM) capabilities on two different DNs, the agent does not get Outbound Campaign notifications and experiences other issue when handling Outbound Campaign interactions.

Workaround: Configure the **Log On As Person** feature of the Outbound Contact Server so that it does not "see" the IM DNs that are configured in the Places of the agent.

Provisioning Outbound Campaigns

Workspace employs the following Outbound privileges for all outbound campaign voice interactions:

- Can Use: Enables access to the Outbound Campaign functions
- Can Cancel Record: Enables agents to decline a preview record so that it is not processed during the current campaign.

- Can Dial Alternative Chained Record: Enables agents to dial a number from the preview record chain that is different from the number selected by the system.
- Can Edit Record Data: Enables agents to edit the outbound record fields that are configured as editable.
- Can Get Next Preview Record: Enables agents to request a new preview record while terminating the processing of the previous record.
- Can Mark Do Not Call: Enables agents to mark a contact as `Do Not Call`.
- Can Reject Record: Enables agents to decline a preview record and redirect it back to the queue to be processed by another agent in the campaign.
- Can Reschedule: Enables agents to reschedule an outbound record of an active call for callback at a different date and/or time.
- Can Reschedule Before Call: Enables agents to reschedule an outbound record of an Outbound Preview for callback at a different date and/or time. The Can Reschedule privilege must be enabled for this privilege to be active.
- Can Reschedule On New Number: Enables agents to reschedule an outbound record using a new number. This action results in a new record being added to the chain.
- Can Set Call Result: Enables agents to set a call result for the outbound record.
- Can Set Interaction Disposition: Enables agent to set a disposition code for Outbound interactions.

> **Important**
> The **Dispositions** tab does not become available until the call is established.

Interaction Workspace also enables privileges for Outbound Push Preview campaigns interactions:

- Can Use Push Preview: Enables agents to actively participate in Outbound Push Preview campaigns.

To ensure that this feature behaves correctly in Workspace, you must configure the `send_attribute` key-value pair as specified in the *Outbound Reference Guide*. For example, where the *Outbound Reference Guide* recommends that you set the field name to `GSW_UNTIL` or `GSW_FROM`, consider setting those values to `GSW_UNTIL` or `GSW_FROM` only. To set an alternative display name in the agent facing interface, you can use the `display-name` key-value as described in the table below.

There are two ways to specify the attribute type of outbound field:

- To create an attribute of the `string`, `integer`, `float`, or `date` type, specify this type in the data type of the outbound field.
- To create an attribute of the `boolean` or `enum` type, follow these two steps:
    1. Specify the type `char` or `varchar` for the data type of the outbound field.
    2. Set the value of `display-type` to `bool` for Boolean, or `enum` for enum.

Configuration of the interaction-workspace section in the objects of type ‘Field’ in Genesys Administrator Extension

Configuration of the interaction-workspace section in the objects of type ‘Field’ in Genesys Administrator Extension

Attribute type	Option	Valid Values	Default Value	Description
boolean	display-type	bool	(none)	Specifies the type of the outbound field to be displayed on the Workspace side. The outbound field value is displayed as a checkbox. `bool` display type is taken into account only if the outbound field data type is `char` or `varchar`
	display	true, false	true	Specifies if the outbound field is displayed or not on the Workspace side. This option is used in addition to the creation of the `send_attribute`. If the `send_attribute` is defined, use this option to hide the outbound field.
	display-name	any string	(none)	Specifies the name that is displayed for this outbound field on the Workspace side. If this option is not set, the outbound field is displayed by using the `send_attribute` value.
	read-only	true, false	true (for system fields), false (for user-defined fields)	Specifies whether this outbound field can be modified
	bool.false-value	any string	false	Defines the string that corresponds to 'false'.

Attribute type	Option	Valid Values	Default Value	Description
	bool.true-value	any string	true	Defines the string that corresponds to 'true'.
string	display	true, false	true	Specifies if the outbound field is displayed or not on the Workspace side. This option is used in addition to the creation of the `send_attribute`. If the `send_attribute` is defined, use this option to hide the outbound field.
	display-name	any string	(none)	Specifies the name that is displayed for this outbound field on the Workspace side. If this option is not set, the outbound field is displayed by using the `send_attribute` value.
	read-only	true, false	true (for system fields), false (for user-defined fields)	Specifies whether this outbound field can be modified
	string.expression [**Added:** 8.5.106.19]	A string defining a valid regular expression	(none)	Specifies what the agent is permitted to enter in the field. If the characters that are entered are not part of the expected input, the character is displayed, but an error icon appears and the entry will not be committed to the backend until the string matches the configured format. When the entered string is corrected, the error icon disappears. For example, the regular expression for an AMEX credit

Attribute type	Option	Valid Values	Default Value	Description
				card number is: "^3[47][0-9]{13}$" (American Express card numbers start with 34 or 37 and have 15 digits).
	string.expression-instructions [**Added:** 8.5.106.19]	Any string	(none)	Specifies the instructions and/or examples that represent how the value configured by the 'string.expression' are populated. This string is displayed as a tooltip on top of the icon that informs the agent about incorrect formatting.
enum	display-type	enum	(none)	Specifies the type of the outbound field to be displayed on the Workspace side. The outbound field possible values are displayed in a combo box. In this case, the list of possible values is defined in the `enum.business-attribute` option. `enum` display type is taken into account only if the outbound field data type is `char` or `varchar`
	display	true, false	true	Specifies if the outbound field is displayed or not on the Workspace side. This option is used in addition to the creation of the `send_attribute`. If the `send_attribute` is defined, use this option to hide the outbound field.
	display-name	any string	(none)	Specifies the name

Attribute type	Option	Valid Values	Default Value	Description
				that is displayed for this outbound field on the Workspace side. If this option is not set, the outbound field is displayed by using the `send_attribute` value.
	read-only	true, false	true (for system fields) false (for user-defined fields)	Specifies whether this outbound field can be modified
	enum.business-attribute	(link to business attribute)	(none)	Link to business attribute that define the enum value. By default the items are sorted alphabetically in this list. To move some or all of these fields to the top of the list, you can use the `order` option. Create this option in the annex of the Business Attribute object that contains the list of values: • Section: `interaction-workspace` • Option: `order` • Default value: `""` • Valid values: A comma-separated list of Business Attribute Value names.
integer	display	true, false	true	Specifies if the outbound field is displayed or not on the Workspace

Attribute type	Option	Valid Values	Default Value	Description
				side. This option is used in addition to the creation of the `send_attribute`. If the `send_attribute` is defined, use this option to hide the outbound field.
	display-name	any string	(none)	Specifies the name that is displayed for this outbound field on the Workspace side. If this option is not set, the outbound field is displayed by using the `send_attribute` value.
	read-only	true, false	true (for system fields), false (for user-defined fields)	Specifies whether this outbound field can be modified
	int.max-value	integer	9223372036854775807	Maximum value accepted.
	int.min-value	integer	0	Minimum value accepted.
float	display	true, false	true	Specifies if the outbound field is displayed or not on the Workspace side. This option is used in addition to the creation of the `send_attribute`. If the `send_attribute` is defined, use this option to hide the outbound field.
	display-name	any string	(none)	Specifies the name that is displayed for this outbound field on the Workspace side. If this option is not set, the outbound field is displayed by using the `send_attribute` value.

Attribute type	Option	Valid Values	Default Value	Description
	read-only	true, false	true (for system fields), false (for user-defined fields)	Specifies whether this outbound field can be modified
	float.max-value	float	3.40282347E+38	Maximum value accepted.
	float.min-value	float	0	Minimum value accepted.
date	display	true, false	true	Specifies if the outbound field is displayed or not on the Workspace side. This option is used in addition to the creation of the `send_attribute`. If the `send_attribute` is defined, use this option to hide the outbound field.
	display-name	any string	(none)	Specifies the name that is displayed for this outbound field on the Workspace side. If this option is not set, the outbound field is displayed by using the `send_attribute` value.
	display-type	date	date	Specifies that the display type of the `date.utc-time-zone` and/or the `date.time-format` options in the corresponding date format outbound field is `date`. **Note:** for Workspace 8.5.105.xx and earlier, if this option is not specified, the `date.utc-time-zone` and `date.time-format` options are not taken into account.
	read-only	true, false	true (for system fields),	Specifies whether this outbound field

Attribute type	Option	Valid Values	Default Value	Description
			false (for user-defined fields)	can be modified
	date.time-format [**Added:** 8.5.102.06]	The value of this option must be specified according to Windows Standards: http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx	""	Specifies the format in which time values in attached data are stored or parsed, for example, `yyyy-MM-dd HH:mm:ss`. Use this key-value pair to make the time format consistent across users and workstations. When this option is not specified, the Workspace date and time format is inherited from the local system setting which can cause inconsistencies for global deployments. Genesys recommends that you configure a date/time format that contains both date and time-of-day information.
	date.time-display-format [**Added:** 8.5.125.04]	The value of this option must be specified according to Windows Standards: http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx	""	Specifies the format in which time values for the DateTime variable in attached data are displayed in Workspace views. You can specify date and time, just date, or just time.
	date.utc-time-zone [**Added:** 8.5.102.06]	true, false	false	Specifies whether the local time zone or UTC time zone is used to store data and time information for case information. If the value `false` is specified, the time is saved as

Attribute type	Option	Valid Values	Default Value	Description
				local time. If the value `true` is specified, the time is saved as UTC time and the following time zone information is added to the formatted time in case no time zone information is specified as part of the value of the `date.time-format` option: `"+00:00"`.

Next, you must configure the `send_attribute` key-value pair as specified in the *Outbound Reference Guide* for the calling list. To set an alternative display name in the agent facing interface, you can use the `outbound.fields.order` key-value as described in the table below.

Configuration of the interaction-workspace section in the objects of type 'Calling List' in Genesys Administrator Extension

Option	Valid Values	Default Value	Description
outbound.fields.order	A comma-separated list of Outbound fields, identified by the value of the key `send_attribute` that is configured in section `OCServer` or `default` in the annex of the `Field` object.	`""`	Defines the order in which the outbound fields are sorted in the outbound data area. The fields that are not listed in this option are listed after the sorted fields, retaining their default sorting as specified by OCS.

You use the following options in the `interaction-workspace` section to configure voice interactions:

- outbound.record-information.frame-color: Specifies the color of the border of the Case Data view frame. This option can be overridden by a routing strategy.
- outbound.record-information.header-foreground-color: Specifies the color of the foreground of the Case Data view header. This option can be overridden by a routing strategy.
- outbound.call-result-values: Specifies the list of call results that are available for the agent to use for an outbound interaction. The call results are displayed in the order in which they appear in the list. For example: `Answered,NoAnswer,AnsweringMachine,Busy,WrongNumber`
- outbound.push-preview.auto-answer: Specifies whether a push-preview outbound interaction is automatically accepted and joined when an Interaction Server Invite event is received. This option can be overridden by a routing strategy. You can also configure auto-answer to display a timer that enables an agent to view case information before the interaction is automatically answered by using the outbound.push-preview.auto-answer.timer and outbound.push-preview.auto-answer.enable-reject options [**Added:** 8.5.105.12].
- outbound.push-preview.use-combined-channel: Specifies whether the outbound push-preview channel is combined with the voice channel.

- outbound.assured-connection.allow-release-engaging-call-timeout Specifies the time, in seconds, after which an engaging call of Outbound Assured Connection can be released. If the value -1 is specified, an engaging call is not allowed to release [**Added:** 8.5.150.06].
- outbound.reschedule-inherit-parent-availability-interval: Specifies whether Workspace preserves the availability interval of the parent Outbound record when rescheduling an Outbound record with a new phone number.
- display-format.interaction-outbound-pull-preview-name: Defines the display format of outbound pull-preview (preview) interactions by specifying a string of field codes.
- display-format.interaction-outbound-push-preview-name: Defines the display format of outbound push-preview interactions by specifying a string of field codes.
- outboundpreview.ringing-bell: Specifies the Outbound preview ringing sound configuration string of an Outbound preview interaction pushed to the agent as a preview.

Procedure

Enabling an agent to use Outbound Campaign functionality call to a contact

Purpose:

To enable an agent to join an Outbound Campaign call to a contact that is stored in Outbound Contact Server (OCS).
Prerequisites

- Genesys Administrator 8.0.2 or higher, configured to show Advanced View, or Genesys Administrator Extension.
- A working knowledge of Genesys Administrator Extension.
- Workspace `Application` object exists in the Configuration Database.

Start

1. Allow the Outbound privileges (see Outbound Campaign Privileges) for the role to which the agent is assigned (refer to the Procedure: Creating a Role and allowing a Workspace privilege and assigning a Role to an agent or agent group).
    - Can Use
    - Can Reject Record
    - Can Cancel Record
    - Can Dial Alternative Chained Record
    - Can Get Next Preview Record
    - Can Use Push Preview
    - Can Mark Do Not Call
    - Can Set Call Result
    - Can Reschedule
    - Can Reschedule On New Number
    - Can Edit Record Data

2. Configure the Outbound options in the `interaction-workspace` section of the Workspace `Application` object (refer to the Outbound configuration option reference for a list of Outbound options and a description of how to configure them).

End

> ### Important
> Workspace does not support OCS Recall Record. To allow for Recall, Genesys recommends that you create an OCS treatment capacity based on the the **Call Result** specified by the agent after the first call attempt.

Dialing an alternate number in Outbound Preview Mode

You can configure an alternate dialing number for an Outbound call that has a `NoAnswer` or `Busy` result, or some other result than `Answered`.

To enable this functionality, you must create a new Treatment object in the Outbound Contact Server (OCS) application in the Genesys Configuration layer. The Treatment object specifies that the next number in the dialing chain for the contact is dialed. The Treatment ensures that each number in the dialing chain is tried until the agent applies a different disposition to the call.

1. In Genesys Administrator Extension, open `PROVISIONING > Outbound Contact > Treatments`.
2. Click `New`.
3. In the New Treatment view, set the following field values:
   - **Name:** ReDial_NoAnswer
   - **Call Result:** No Answer
   - **Apply to Record:** Next in chain
   - **Number in Sequence:** 1
   - **State:** Enabled
   - **Cycle Attempt:** 10
   - **Interval, minutes:** 1
4. Assign the new Treatment to the calling list. Open one or more of your Calling List objects in Genesys Administrator Extension and select the Treatments tab.
5. Click `Add`.
6. In the Browse dialog box, select the treatment that you just created.
7. Click `OK`.
8. Click `Save & Close`.
9. In Genesys Administrator Extension, open the Workspace Application object and configure it to use the Treatment.

10. In the `interaction-workspace` section assign the value `personal` to the outbound.treatment-mode option. Setting this option to `personal` adds the `GSW_TREATMENT = RecordTreatPersonal` attached data to the `EventUserEvent` that is generated when the record is marked as `processed`. This attached data informs OCS that a treatment should be applied to the outbound record if the call result matches the result that is set for the record. This ensures that the callback is assigned to the agent who set the `No Answer` disposition for the call and not to the next available agent who is working on the same campaign. Refer to the scenario that is described below.

Scenario

1. Your Outbound campaign is started in Preview mode.
2. An agent logs in to Interaction Workspace.
3. The agent clicks `Get Record` to retrieve an Outbound Record from the Outbound Campaign on which they are working.
4. The agent receives an Outbound Record and selects the number to be dialed from the list of available phone numbers in the Outbound Chain.
5. The agent calls the selected number.
6. When the call is over, the agent sets the Call Result to `No Answer` and then clicks `Done`, closing the interaction.
7. OCS applies the `ReDial_NoAnswer` call treatment that you created to handle the No Answer call result.
8. An immediate callback for the Outbound Record is triggered (refer to the "Call Handling/Treatments" section in the *Outbound Contact 8.1 Deployment Guide*).
9. The agent immediately receives a *personal* callback for this outbound record because the value of the `outbound.treatment-mode` option is set to `personal`.
10. The agent accepts the personal callback.
11. The preview record is displayed and the agent is able to dial one of the available numbers from the outbound chain.

Timed Auto-dial in Outbound Preview campaigns

[**Added:** 8.5.109.16]

You can specify how agents who are part of Push Preview, Pull Preview, and Reschedule Preview outbound campaigns dial campaign calls. Use the outbound.timed-preview-auto-dial option to specify one of the following dial scenarios:

- Manual dialing (`-1`, default value)—Agents manually dial calls after viewing the call preview.
- Auto-dial (`0`)—The call is automatically dialed when agents get or accept a new record.
- Timed auto-dial (any value greater than `0`)—Calls are automatically dialed the specified number of seconds after agents get or accept a new record. A countdown is displayed on the record preview to inform agents of how long they have before the call is dialed.

Push Preview campaign pre-requisites

[**Added:** 8.5.109.16]

To ensure that Workspace properly handles scenarios where a call that is generated from a Push Preview Campaign record is transferred to another agent who is also engaged in the same Push Preview Campaign, use the following configuration:

Configure a Routing Point or ACD Queue belonging to the TServer/SIPServer to the Voice Transfer Destination of the Campaign Group object that assigns agents as transfer targets.

Personal versus campaign callbacks

[**Added:** 8.5.115.17]

To specify whether rescheduled calls/callback are personal (the agent who created the callback), campaign (any agent active in the campaign), or both, use the outbound.callback-types

Forcing agents to complete Outbound Record processing before transferring a call

[**Added:** 8.5.117.18]

By default, if an outbound campaign call is transferred from an Outbound enabled agent to an agent who is not enabled to handle outbound campaign calls, the call result set by the Outbound agent is lost because the ownership of the record is transferred from an Outbound agent to another agent.

Use the outbound.complete-record-before-transfer option to control whether or not the call result is retained. Setting the value of this option to `true` forces Workspace to complete the processing of the Outbound record before the call is transferred or conferenced to another agent, and makes the Outbound record read-only.

Use the outbound.call-result-is-mandatory option to ensure that the transferring agent is forced to set a call result prior to transferring an Outbound record.

Setting up manual dialing of alternate numbers

[**Added:** 8.5.115.17]

There are many scenarios where an agent has to reject an Outbound Record because the provided phone number or phone numbers are incorrect or empty. For example, the phone number might have been entered incorrectly into the record and is missing a digit. A blank record might be intentional. Perhaps the requirements of the state are that all campaign calls must be manually dialed. In both of these scenarios, the agent needs a way to enter a phone number for the chain.

Make the following configurations to enable agents to enter a new phone number from the active Outbound Interaction toolbar:

1. Grant the Outbound - Can Dial On New Number privilege.
2. Set the value of the expression.outbound-campaign-phone-number option to a valid regular expression that confirms to the dialing requirements of the campaign. This option validates the number that an agent enters into the **New Phone Number** dialog box.