Outbound Contact Deployment Guide

Configuration

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Configuration

Contents

Note:	All of the information in this section is based on using Genesys Administrator to configure and install your Outbound applications. However, you can still use Configuration Manager.

Before you create an Application object, make sure that an application template exists. The template provides most of the application's configuration options and default values.

To locate an existing template, open the Environment view in Genesys Administrator and then the Application Templates view. If the template is absent, import one from the Templates folder on the Outbound Contact Center CD.

Importing a template

Start

1. Select the Application Templates view.
2. Open the Tasks panel, if necessary, and click Import Application Template.
3. In the file-selector dialog box, do the following:
4. If necessary, navigate to where the template is stored.
5. Select the appropriate .apd file.
6. Click Open.
7. On the Configuration tab, enter or modify information as required.
8. On the Options tab, enter or modify information as required.
9. If the Templates folder also contains a metadata file, import that metadata into the Application Template.
10. To save the new Application Template and register it in the Configuration Database, perform one of the following:
    a. Click Save and Close to return to the list of Application Templates.
    b. Click Save to continue configuring the Application Template.
    c. Click Save and New to save the new Application Template and start creating another one.

End

Configuration Advisory

Application objects represent software components in Genesys Administrator. This topic describes four Outbound Contact application objects:

- Outbound Contact Server (OCS)
- CPD Server (optional)
- CPD Proxy Server (optional)

- Outbound Contact Manager (optional if you are using Genesys Administrator)

Outbound Contact also requires the following applications:

- Genesys Administrator--Allow you to configure all Outbound Contact applications and objects, run dialing sessions, and monitor all related activities
- Stat Server (Reporting)--Determines what agents are assigned to which Agent or Place Groups, identifies the current Agent State, and for reporting purposes.
- CCPulse+ (Reporting)--Calculates real-time and historical Outbound-specific statistics
- ICON (Reporting)--9Calculates historical Outbound statistics

The person who will run or change an Outbound dialing session/campaign requires access permissions that include Read access privileges to all campaign-related configuration objects. Click the `Permissions` tab of each configuration object to view the `Access Groups` that have permission to read it.

Client-Side Port Security Configuration

To increase security, you can define a fixed port for the connection between an Outbound Contact component and another server that is behind a firewall. The client-side port definition feature allows a server application to control the number of client connections, preventing the server from an excessive number of malicious requests to the same server-side port.

For configuration instructions, see the "Client-Side Port Definition" chapter of the *Genesys Security Deployment Guide*. The following table identifies which Outbound Contact-specific components support this configuration.

Component Support of Client-Side Port Security

Server Clients	Configuration Server/Configuration Server Proxy	T-Server
OCS	Yes	Yes
CPD Server	Yes	Yes
CPD Proxy Server	Yes	Not Applicable

Connections to Configuration Server

During the application installation, new command-line arguments are added to connect to Configuration Server using the port designated during installation, which are then used during application startup. The arguments include:

`-transport-address and -transport-port.`

The command-line format for starting a connection to Configuration Server would be:

```
cm_server.exe -host <host_name> -port <port_number> -transport-address <IP address>
-transport-port <port number> -app <application_name>
```

After installation, these arguments appear in three places:

- Configuration Server Application object > Configuration tab > Server Info section.
- (Windows operating system) startServer.bat file; (UNIX operating systems) run.sh.
- In the Registry when the application (OCS, CPD Server, or CPD Proxy Server) is started as a Service

Note:	To support reconnection to Configuration Server, you must still create or update the existing connection to Configuration Server in the OCS Configurations tab of the OCS Application object, following the standard procedure for configuring connections to other servers. For specific instructions associated with client-side port connections, see the *Genesys Security Deployment Guide.*

Outbound Contact Server

Outbound Contact Server (OCS) is the main component of Outbound Contact.

Configuring OCS

Start

1. In Genesys Administrator, open the Environment view and then select the Applications view.
2. From the toolbar, click New.
3. In the Browse dialog box, select the Application Template for this application (navigating to the appropriate folder if necessary), and click OK.

Note:	If an Application Template for OCS is not available, click Cancel and import or create a template. Then restart this procedure to create the new template.

4. On the Configuration tab, enter the following information for the OCS application:
   - Name: Enter the name of the OCS application
   - Connections: Click Add, and then add a T-Server application. Optionally, you can also add a Message Server application.

   The only servers for which OCS searches in the Connections section of its application at startup are T-Server and Message Server (optional). Connection to other servers that are required to run an outbound dialing session (such as CPD Server, Stat Server, and Interaction Server) can be specified on the Configuration tab of a Campaign Group object.

Notes:	• If you are configuring OCS to support TLS, see the *Genesys Security Deployment Guide* for configuration instructions; also, see Transport Layer Security Connections for information

	on which Outbound Contact components support TLS connections for this release. • If you are configuring a connection to Interaction Server, create a port called `ESP`. Use this ESP PortID instead of the default PortID, when you configure a connection to the OCS `Application` object of the Interaction Server `Application` object. This makes OCS a server for Interaction Server and Interaction Server a client for OCS. • If you are configuring TLS between OCS and DB Server, add a Database Access Point (DAP) to DB Server on the `Configuration` tab/`Connections` section of the OCS `Application` object. • If you are configuring TLS between OCS and CPD Server/CPD Proxy Server, add a connection on the `Configuration` tab/`Connections` section of the OCS `Application` object to CPD Server/CPD Proxy Server respectively.

5. In the `Server Info` section of the `Configuration` tab, do the following:
   a. Enter the host name of the computer on which this application will be installed, and enter the port that the application will use for client connections.
   b. If you plan to use another server as a backup, in the event that the primary server fails, enter the name of the backup server and adjust the value of the `Reconnect Timeout` option.
   c. If you need OCS to support communication with clients when using HTTP or HTTPS requests (for example, to update records over HTTP/HTTPS), configure the interface by specifying a separate listener port for HTTP Proxy Server with the Connection Protocol set to `http`. For more information about HTTP and HTTPS requests and HTTP Server, see Outbound Contact and HTTP Server and the *Proactive Contact 8.0 Solution Guide.*

Note:	Dynamic changes to this port are not supported. As a result, any such changes are not communicated to an HTTP Proxy that is already running. However, any HTTP Proxy started after that change will reflect the change.

6. Define the `Working Directory` and `Command-Line` properties - for example:
   `Working Directory: C:\GCTI\Outbound Contact ServerCommand Line: cm_server.exeCommand Line Arguments: -host <host_name> -port <port_number> -app <Capplication_name>`

Note:	If you are implementing the client-side port security feature, specify the additional arguments described in Client-Side Port Security Configuration.

7. Click the `Options` tab, and change the values of the configuration options according to your configuration.

For detailed information about OCS options, see the Outbound Contact Server Options.

End

Genesys Administrator

For configuration and installation procedures for Genesys Administrator, see the *Framework Genesys Administrator Deployment Guide.*

CPD Server

Outbound Contact requires hardware that recognizes call results, a capability known as call progress detection (CPD). Outbound Contact works with a CPD device provided by the switch vendor, or with CPD hardware from Dialogic.

If the switch does not have call progress detection capability, you must install switch-extending equipment (a Dialogic board) to perform this function. Install the GlobalCall Dialogic package before installing the CPD Server.

Note:	Beginning with release 7.5, you can also install the Dialogic Host Media processing (HMP) software. Only one instance of CPD Server using HMP software can be executed on a host computer.

Before you configure CPD Server, have on hand the Worksheet Definitions. Refer also to CPD Proxy Server and Dialogic Board Setup.

Configuring CPD Server

Start

1. In Genesys Administrator, open the `Environment` view and then select the `Applications` view.
2. From the toolbar, click `New`.
3. In the `Browse` dialog box, select the Application Template for this application (navigating to the appropriate folder if necessary), and click `OK`.

Note:	If an Application Template for OCS is not available, click `Cancel` and import or create a template. Then restart this procedure to create the new template.

4. On the `Configuration` tab, enter the following information for the CPD Server application:
   a. Name: Enter the name of the CPD Server application.

b. Connections: Click Add, and then add a T-Server application and a Message Server application to which this server will connect.

5. In the Server Info section of the Configuration tab, perform the following,

a. Enter the host name of the computer on which this application will be installed, and enter the port that the application will use for client connections.
If you plan to use another server as a backup in the event that the primary server fails, and if a Dialogic board is installed, enter the name of the backup server and adjust the value of the Reconnect Timeout option.

Note:	If you are configuring CPD Server to support TLS, see the *Genesys Security Deployment Guide* for configuration instructions. Also, see Transport Layer Security Connections for information on which Outbound Contact components support TLS connections for this release.

b. Define the Working Directory and Command Line properties—for example:

```
Working Directory: C:\GCTI\cpd_server
Command Line: cpdserver.exe
Command Line Arguments:
-host <host_name> -port <port_number> -app <application_name>
```

Note:	If you are implementing the client-side port security feature, specify the additional arguments described in Client-Side Port Security Configuration.

6. Click the Options tab, and change the values of the configuration options according to your configuration.
For detailed information about the options for CPD Server, CPD Server Options.

End

CPD Proxy Server

CPD Proxy Server is the core load-distribution component of CPD Server. The main task of this optional component is to distribute client requests among various CPD Servers, in order to balance the call load and optimize the use of hardware resources within the system. You must configure CPD Proxy Server before you install it.

Configuring CPD Proxy Server

Start

1. In Genesys Administrator, open the Environment view and then select the Applications view.
2. From the toolbar, click New.
3. In the Browse dialog box, select the Application Template for this application (navigating to the appropriate folder if necessary), and click OK.

Note:	If an Application Template for OCS is not available, click Cancel and import or create a template. Then restart this procedure to create the new template.

4. On the Configuration tab, enter the following information for the CPD Proxy Server application:
   a. Name: The name of the CPD Proxy Server application.
   b. Connections: Click Add, and then add the CPD Server(s) and the Message Server to which CPD Proxy Server will connect.
5. In the Server Info section of the Configuration tab, perform the following,
   a. Enter the host name of the computer on which this application will be installed, and enter the port that the application will use for client connection.
   If you plan to use another server as backup, in the event that the primary server fails, enter the name of the backup server and adjust the value of the Reconnect Timeout option. See Connection and Reconnection for more information.

Note:	If you are configuring CPD Proxy Server for TLS, see the *Genesys Security Deployment Guide* for configuration instructions. Also, see Transport Layer Security Connections for information on which Outbound Contact components support TLS connections for this release.

   b. Define the Working Directory and Command Line properties--for example:
   `Working Directory: C:\GCTI\cpd_proxyCommand Line: cpdproxy.exe Command Line Arguments: -port <port_number> -host <host_name> -app <application_name>`

Note:	If you are implementing the client-side port security feature, specify the additional arguments described in Client-Side Port Security Configuration.

6. Click the Options tab, and change the values of the configuration options according to your configuration.
   For detailed information about these options, see Log Files.

Note:	If you have a multi-tenant environment and want to share HMP resources, you can also configure options to restrict dialing and engaging channels. For more information, see Centralized Configuration and Shared HMP Resources.

End

DM3 Boards with CPA Functionality

If you are using ASM mode, and if you are using the DM3 families of boards with CPA functionality that CPD Server supports, you must install the GlobalCall Dialogic package before you install CPD Server. These families include the following:

- DM/V1200-4E1 (number of ports = 120)
- DM/V600-2E1 (number of ports = 60)
- DM/V960-4T1 (number of ports = 96)
- DM/V480-2T1 (number of ports = 48)

Outbound-Specific Statistics for Stat Server

In addition to determining which agents are assigned to which Agent or Place Groups and identifying the current Agent State, Stat Server requires Outbound statistic definitions in order to monitor the Outbound activities of Campaigns, Calling Lists, Dialing Sessions, ACD Queues, and agents.

Importing Outbound-Specific Statistics into the Stat Server Object

Start

1. In Genesys Administrator, open the `Environment` view and then open the `Applications` view.
2. On the Details panel, double-click the `Stat Server` object.
3. Click the `Options` tab.
4. Locate and import `StatProfile.cfg` from the `\solution_specific\ocs\templates\realtime` folder on the Reporting Templates 7.2 CD.

Note:	Stat Server is usually configured using the Framework Configuration Wizard or in Configuration Manager. In release 8.x, you can also configure it in Genesys Administrator and using the Outbound Contact Wizard.

End

The following sections provides information on Outbound-specific real-time statistics that were introduced after Release 7.2.

New Real-Time StatServer Java OCCExtensions Statistics as of Release 7.6 or higher

Note:	These statistics require Stat Server version 7.6.1 or higher with OCC Extension 7.6.1 or higher.

CurrentTrustFactor

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentTrustFactor`
- Objects: `Agent, Place`

This metric, with values ranging from 0% to 100%, defines the trust factor for a specific agent. For more information about how this factor is calculated and when it is used, see the time-to-ready-tolerance option. This statistic is calculated based on the following formula: A_{indiv} = (1 - trust factor) * 100 = $N_{correct\ notifications}$/ $N_{total\ notifications}$ * 100%

CurrentFeedbackAccuracy

- Category: JavaCategory
- JavaSubCategory: OCCStatExtension.jar:CurrentFeedbackAccuracy
- Objects: CampaignGroup

This metric, with values ranging from 0% to 100%, defines the current accuracy of the agent's ready time feedback for a session.

This statistic is calculated based on the following formula:

A_{sess} = (1 - Total Number of False Notifications/ Total Number of Notifications) * 100%

New Real-Time StatServer Java OCCExtensions Statistics as of Release 7.5 or higher

CurrentAgentAssignment

- Category: JavaCategory
- JavaSubCategory: OCCStatExtension.jar:CurrentAgentAssignment
- Objects: Agent, Place

CurrentCampaignGroupDBID

- Category: JavaCategory
- JavaSubCategory: OCCStatExtension.jar:CurrentCampaignGroupDBID
- Objects: Agent, Place

CurrentNumberAgentsAssigned

- Category: JavaCategory
- JavaSubCategory: OCCStatExtension.jar:CurrentNumberAgentsAssigned
- Objects: CampaignGroup

New Real-Time StatServer Java OCCExtensions Statistics as of Release 7.2 or higher

CurrentNumberChainsReady

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentNumberChainsReady`
- Description: Current number of chains ready.
- Objects: `CampaignGroup`, `CallingList`, `CampaignCallingList`

CurrentHitRatio

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentHitRatio`
- Description: Current hit ratio.
- Objects: `CampaignGroup`

CurrentNumberDialPortsUsed

- Category: `JavaCategory12:31 PM 2/17/2010`
- JavaSubCategory: `OCCStatExtension.jar:CurrentNumberDialPortsUsed`
- Description: Current number of dial ports used.
- Objects: `CampaignGroup`

CurrentNumberEngPortsUsed

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentNumberEngPortsUsed`
- Description: Current number of engaged ports used.
- Objects: `CampaignGroup`

CurrentBusyFactor

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentBusyFactor`
- Description: Current number of busy factor.
- Objects: `CampaignGroup`

CurrentOverdialRate

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentOverdialRate`
- Description: Current number of overdial rate.
- Objects: `CampaignGroup`

CurrentAverageWaitingTime

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentAverageWaitingTime`
- Description: Current average waiting time.
- Objects: `CampaignGroup`

CurrentNumberChainsFinalized

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentNumberChainsFinalized`
- Description: Current number of chains finalized.
- Objects: `CampaignGroup`, `CallingList`, `CampaignCallingList`

CurrentNumberChainsRetrieved

- Category: `JavaCategory`
- JavaSubCategory: `OCCStatExtension.jar:CurrentNumberChainsRetrieved`
- Description: Current number of chains retrieved.
- Objects: `CampaignGroup`, `CallingList`, `CampaignCallingList`

The Outbound Solution Object

You can start Outbound Contact through Solution Control Interface (SCI), a Framework application. SCI uses the Outbound Solution object to start and stop the Outbound Contact components.

Note:	You can also start Outbound Contact through Genesys Administrator. For more information, see *Framework Genesys Administrator Help*.

In Genesys Administrator > Provisioning tab > Environment, select the `Solutions` folder, and determine if the Outbound Solution object is in the list. If it is not, you must import it from the product CD and then configure it.

Importing and Configuring the Outbound Solution Object

Start

1. In Genesys Administrator, select `Provisioning > Environment > Solutions.`
2. From the Tasks panel, select `Create > Upload solution.`
3. In the `Click Add and choose...` dialog box, click `Add` and navigate to the Template folder on the product CD.
4. Select the `OCSolution_80.sd` file, click `Open` and then `Upload.`
5. Double-click the solution to open the Outbound Solution object.
6. On the `Configuration` tab:
   - In the `Name` field, enter a name.
   - In the `Assigned Tenant` field, select a tenant.
   - In the `Solution Control Server` field, select a server.
7. Click the `Components` section and then add the applications that Outbound Contact needs in order to run (see the following table).
8. Click `Save and Close.`

End

The following table shows the applications that you could add to the `Components` section for the Outbound Solution Object. The table heading definitions are as follows:

- Application--The name of the application that Outbound Contact needs in order to run.
- Optional--The requirement status for the application: `False` means that the application is mandatory in order for Outbound Contact to be able to run; `True` means that the application is optional, and that it is not mandatory for Outbound Contact to be able to run.
- Priority--The order in which the application starts, relative to the other applications.

Outbound Solution Object Components Tab

Application	Optional	Priority
T-Server	False	1
Interaction Server	True	2
DB Server	False	2
Stat Server	False	2
Data Sourcer	True	2
ETL Proxy	True	2
Outbound Contact Server	False	3
Message Server	True	4
CPD Server	True	4

Outbound Contact Manager or Genesys Administrator	True	5