Outbound Contact Deployment Guide

Outbound Schedules

5/9/2025

Outbound Schedules

Contents

Outbound Schedules enable you to automate control of dialing sessions that run in the contact center more than once; that is, their execution recurs. For example, if specific dialing sessions run every weekday, by using Outbound Schedules you can configure OCS to automatically run these dialing sessions without the need for manual everyday operations to manage them.

An Outbound Schedule is an object that:

- Contains the instructions for when its execution recurs;
- Unites one or more dialing sessions that are to be executed at each recurrence.

Each dialing session that is a part of the Schedule contains additional configuration parameters that specify which commands are automatically executed by OCS for this dialing session and when they should occur.

The following actions are available for automation:

- Load
- Start (with dialing parameters)
- Stop
- Set Dialing Mode and/or Set Dialing Parameters
- Unload
- Force Unload
- Complete (Stop if required, followed by Unload)

The Outbound Schedule determines when and at what intervals the included dialing sessions are executed. A Schedule typically unites a set of dialing sessions that should be activated and deactivated based on the same rules.

OCS supports an unlimited number of Schedules, each Schedule containing an unlimited number of dialing sessions. Additionally, the same dialing session can be included in more than one Schedule. Dialing sessions that are included in the same Schedule do not need to be associated with the same Campaign, Group, or have anything else in common.

Note:	Genesys Administrator is used for configuration of Outbound Schedules. For instructions on creating and configuring Outbound Schedules, see the Provisioning > Outbound Contact > Schedules section in the *Framework Genesys Administrator Help*.

The following table shows the types of recurrence that are supported for Outbound Schedules:

Recurrence Types for Outbound Schedules

Type of recurrence	Available Settings	Duration of Execution	Example
Daily	Repeat every N day(s) at specific time	From specified start date until specified end date or indefinitely	* Run every day from 8 am to 5 pm, all summer, from 1st of June, 2011

			until 31st of August, 2011. • Run every three days from 8 am to 12 pm, from 1st of September, 2011.
Weekly	Repeat every N week(s) on specified days of week at specific time	From specified start date until specified end date or indefinitely	* Run every Saturday and Sunday, 8 am to 1 pm, from 1st of June, 2011 until 31st of August, 2011. • Run every second Monday, beginning at 8 am, from September 1st, 2011.
Monthly	Repeat every N month(s) on the specified days at specific time.	From specified start date until specified end date or indefinitely.	* Run every month, on 15th, 16th,19th and last day of the month, 8 am to 5 pm, from 1st of June, 2011 until 31st of August, 2011. • Run every other month, on all days except for 10th and 11th, beginning at 8 am, from September 1st, 2011.
Once	Execute once at specific time.	Execute on specified date.	* Run once, 3 pm to 4 pm, on the 1st of July, 2011.

A Schedule with any type of recurrence may also specify stop conditions, such as "stop at the specified time of day" and/or "stop after a specified time interval". When an Outbound Schedule is stopped, it sends the Complete command (that is Stop, if necessary, followed by Unload) to all dialing sessions that are configured for this Schedule and are still active or running.

Schedule Items

Each dialing session that is associated with an Outbound Schedule is an item in that Schedule. Execution of each Schedule item is controlled by execution points. Each execution point comprises the following:

- An action to be done to the dialing session.
- A condition that specifies when the action should be performed.

Execution points are of two types: instant and sequential. Any action that occurs at an execution point can be either sequential or instant. However, OCS executes instant execution points differently from sequential execution points, as explained in the following sections.

Sequential Execution Points

This category or set contains execution points that should logically be executed one after another. For example a dialing session can be started only after it has been loaded, and therefore Load should generally be the first execution point and Start should be the second in the set of sequential execution points. OCS activates the first execution point of this set when the Schedule is activated and only switches to the next (N + 1) execution point when current (Nth) execution point has been executed. There must be at least one sequential execution point for each Schedule item. Sequential execution points cannot be configured as repeatable.

Note:	When defining sequential execution points for a Schedule, the At time condition specified for a Stop action must not be earlier than the At time condition specified for the corresponding Start action. OCS does not assume that the earlier Stop time is on the next calendar day; instead, it starts the action at the specified time and then immediately stops it. This is not an issue when defining Stop actions with the After condition; OCS supports execution on the following day in this case.

Instant Execution Points

This set of execution points is activated immediately upon Schedule activation. Instant execution points are not dependent on each other. For example, if a Schedule item should be completed when a specific condition is met, the Complete action should be added to the set of instant execution points. This set can be empty or contain one or more execution points. Instant execution points can be configured as repeatable, which means they are executed each time the specified condition for the given execution point is met.

Execution Points

Execution Points that are created for each Schedule item define what actions are executed for the Schedule item and when they are executed. An execution point consists of an action (for example, Load, Start, or Unload) and conditions. The following table summarizes the conditions that can be applied to each action.

Conditions Applicable to Schedule Actions

Type of Condition	Parameters	Description
No condition	Not applicable	Executes action immediately
At time	Time of day	Executes action at specified time of day, for example at 3 o'clock.

After	Time period	Executes action after specified time period has elapsed, for example after 30 minutes.
Time in state	Name of dialing sessionName of stateTime spent in state	Executes action when specified dialing session assumes the specified state and spends specified time interval in that state, for example when dialing session 1 has unloaded, or when dialing session 2 has been running for 1 hour.
Value of statistics	Name of statisticsName of objectName of Stat ServerTarget value of the statistics	Executes when specified statistics on specified object received from specified Stat Server assumes specified value, for example when there are no more dialing records in the calling lists.

Note:	Conditions cannot be logically combined and each action can have one, and only one, associated condition. OCS attempts to execute the action specified for each execution point and continues Schedule execution regardless of the success or failure of the action. For example, if you attempt to Stop and Unload a Schedule item that is already stopped, OCS will fail to execute the Stop action. Nevertheless, OCS continues to the next action configured for the Schedule item and will next try to execute the Unload action.

How Schedules are Executed

All Outbound Schedules are executed independently. When it starts up, OCS reads all Outbound Schedules from the configuration and calculates the nearest date and time for each Outbound Schedule to be activated. When that activation date and time comes, for each Schedule item, OCS activates the first execution point of the sequential set and (if an instant set is present in the Schedule) all execution points of the instant set.

Activation of an execution point means that it is ready to be executed whenever the associated condition is met. For example, if the condition is the value of a statistic, OCS begins monitoring the specified statistic for the target value. If the condition specified as time interval after which the action occurs, OCS starts the countdown for the given time interval at which the execution point is to be activated.

An Outbound Schedule is deactivated after all Schedule items that it contains are unloaded or when the stop conditions for the Schedule are met. When the Schedule is completed, OCS calculates the time for the next activation (unless the Schedule was configured to run only once). The Schedule then waits in a dormant state until the next activation. In addition to control by the configured sets of sequential and instant execution points, OCS enables you to manually control the Schedule items at any time during Schedule execution in the same way as for independent dialing sessions. You can manually stop, start, and unload any Scheduled item using any administrative OCS client (that is, Genesys Administrator or Outbound Contact Manager). You can also check the status of any Schedule

item in Genesys Administrator or Outbound Contact Manager.

Manual Operations in Schedules

Although you can perform manual operations on schedule items, manually unloading a schedule item breaks its link to a schedule and the schedule item loses its connection to the schedule. Then, when the standalone session is activated again, the schedule does not resume control over it. Only unloading disassociates the item from the schedule. The stop, start, and set dialing modes do not affect this association.

Dynamic Disabling of Schedules

Whenever a Schedule is marked via Genesys Administrator as disabled, OCS stops executing it (if it was active at the time) and terminates execution of all Schedule items within this Schedule.

Primary / Backup Notifications

For each active Schedule, the primary OCS notifies its backup about the Schedule's current state, including all of the parameters for activating and deactivating each Schedule item, and provides updated information any time a change to the Schedule status occurs. Because it is fully informed of all Schedule configuration and status information, in case of a switchover, the backup OCS can resume execution of the Schedule from exactly the same position where primary OCS has left off.