



**Interaction Data Extractor
Printed Help**

PureConnect powered by Customer Interaction Center® (CIC)

2018 R1

Last updated October 31, 2017

Abstract

This document is a printable version of the Interaction Data Extractor Help.

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Interaction Data Extractor

Interaction Data Extractor

The Interaction Data Extractor is a web-based application that allows you to export CIC data from CIC database tables. Interaction Data Extractor generates a flat-format CSV file that can be directly used or imported into a variety of 3rd-party Business Intelligence (BI) tools.

Installation

Interaction Data Extractor is a CIC Web application and is installed using the installation procedure in the *CIC Web Applications Installation and Configuration Guide* found at:

https://help.genesys.com/cic/mergedprojects/wh_tr/desktop/pdfs/cic_web_applications_icg.pdf

There are additional prerequisites to using the Data Extractor application. Note, it is not necessary to install and configure the prerequisites if Interaction Data Extractor is not being used.

Oracle

In order to run Setup Assistant during installation and to allow the CIC server to communicate with an Oracle database, Oracle requires an additional **32 bit** client to be installed on the CIC server. For database version requirements, see <http://testlab.inin.com/ProductsPage.aspx?ProductType=9>

To maintain compatibility with all of the features in CIC, we recommend that the Oracle client path be added to the PATH environment variable on the CIC server, and we also recommend you create the ORACLE_HOME environment variable with the proper path. For best results, the version of the Oracle client should match the version of the Oracle Server. It is also a best practice to patch all Oracle clients after the client has been installed on the CIC server.

For information on patching an Oracle 12c client, see

<https://my.inin.com/products/selfhelp/kb/layouts/listform.aspx?PageType=4&ListId={30AFF89A-F3A4-4E0C-9F7F-597BDB996AB5}&ID=238&ContentTypeID=0x0100BC7B80188A53F14EA868B7C68AB5686E>

SQL Server

SQL Server does not require an additional client to allow a Windows Server based CIC server to communicate with Microsoft SQL Server Database, nor is an additional client required to run Setup Assistant. SQL Server features use ODBC drivers that are built into Windows Server. However, Interaction Data Extractor requires SQL command line utilities for SQL Server to be installed, which are not included by default in Windows Server. SQL command line utilities require an additional install and also require that the path to SQLCMD be added to the PATH environment variable on the CIC servers.

To download the 2012 version of SQLCMD, see <https://www.microsoft.com/en-us/download/details.aspx?id=36433>

To download the 2016 version of SQLCMD, see <https://www.microsoft.com/en-us/download/details.aspx?id=52680>

For other versions of SQL Server (2008 or 2014) SQLCMD can be acquired by running the SQL Server Database Server Install and only selecting management tools to complete the install.

Configuration

Configuration

To configure the Data Extractor settings in Interaction Administrator, see the topics listed below **Configuration**.

Licensing

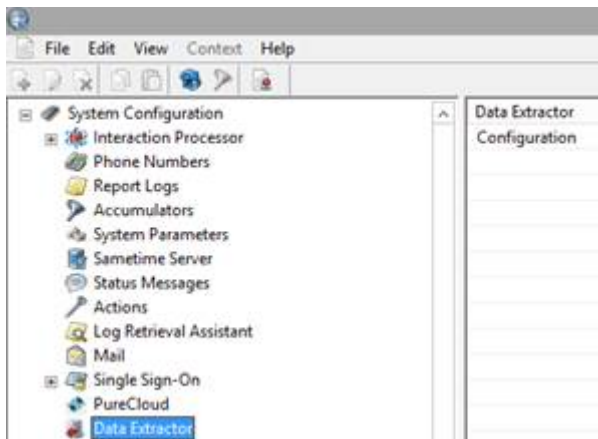
The Interaction Data Extractor requires an access license. To verify if you have the proper license, go to the License Management form in Interaction Administrator and look for the **I3_ACCESS_DATA_EXTRACTOR** license.

Title	Assignable Allowed	Assignable Configured	Concurrent Allowed	Concurrent Configured	Concurrent In Use
I3_ACCESS_CONTENT_MANAGER_READ_ONLY_CLIENT	100	0	100	0	0
I3_ACCESS_CONTENT_MANAGER_READ_ONLY_CLIENT...	100	0	100	0	0
I3_ACCESS_DATA_EXTRACTOR	100	11	100	0	0
I3_ACCESS_DIALER_ADDON	100	52	100	0	0
I3_ACCESS_DIALER_SUPERVISOR_PLUGIN	100	52	100	0	0
I3_ACCESS_DIALING_CALL_PORT_ADDON	100	0	100	0	0
I3_ACCESS_FEEDBACK	100	52	100	0	0
I3_ACCESS_FEEDBACK_SUPERVISOR_PLUGIN	100	0	100	0	0
I3_ACCESS_HISTORICAL_REPORT_SUPERVISOR_PLUGIN	100	52	100	0	0
I3_ACCESS_INTERACTION_CLIENT_OPERATOR_EDITION	100	52	100	0	0

If the license is not present or you do not have enough licenses, please contact your sales representative.

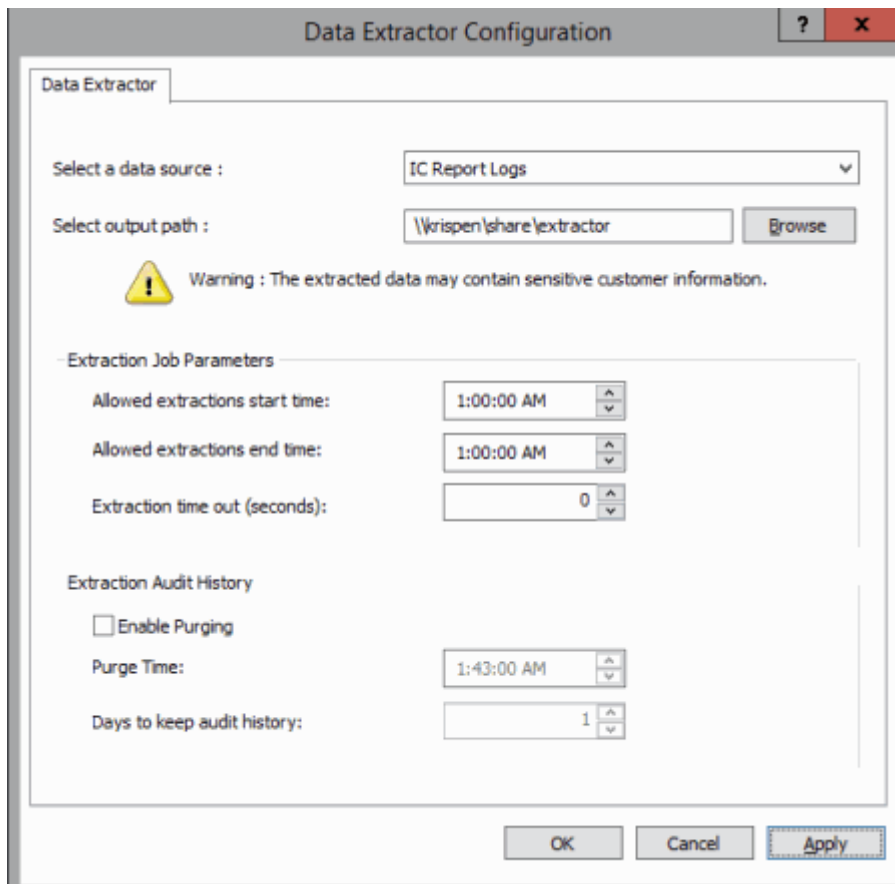
Data Extractor Settings

To use the Interaction Data Extractor tool, configure the Data Extractor settings in Interaction Administrator.



Configuring Data Extractor

1. From Interaction Administrator, in the System Configuration container, select the **Data Extractor** subcontainer.
2. In the workspace under Data Extractor, click **Configuration** to open the Data Extractor Configuration dialog box.

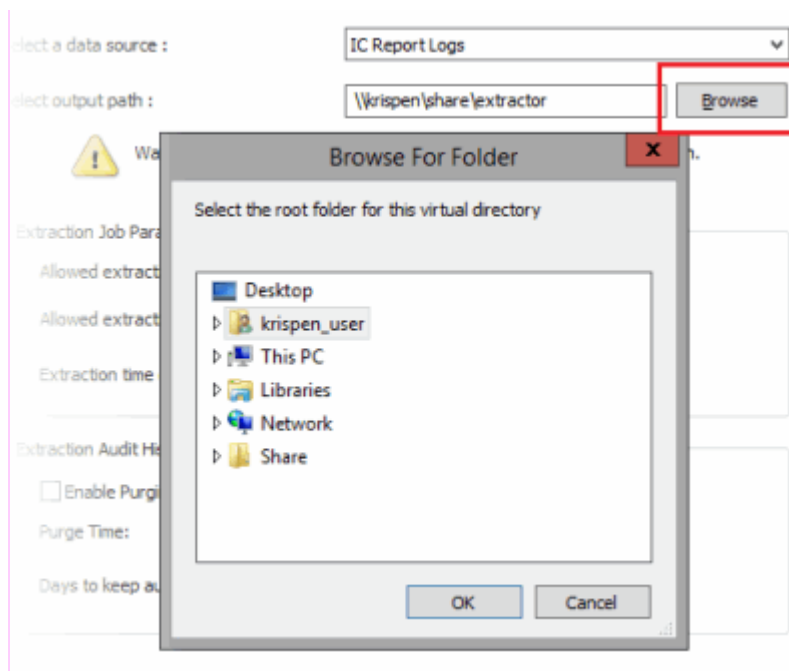


The screenshot shows the 'Data Extractor Configuration' dialog box. It has a title bar with a question mark and a close button. The main area is titled 'Data Extractor' and contains the following fields and controls:

- 'Select a data source :' with a dropdown menu showing 'IC Report Logs'.
- 'Select output path :' with a text box containing '\\rispen\share\extractor' and a 'Browse' button.
- A warning icon (yellow triangle with an exclamation mark) and the text: 'Warning : The extracted data may contain sensitive customer information.'
- 'Extraction Job Parameters' section with three spinners:
 - 'Allowed extractions start time:' set to '1:00:00 AM'.
 - 'Allowed extractions end time:' set to '1:00:00 AM'.
 - 'Extraction time out (seconds):' set to '0'.
- 'Extraction Audit History' section with:
 - An unchecked checkbox for 'Enable Purging'.
 - 'Purge Time:' spinner set to '1:43:00 AM'.
 - 'Days to keep audit history:' spinner set to '1'.

At the bottom, there are three buttons: 'OK', 'Cancel', and 'Apply'.

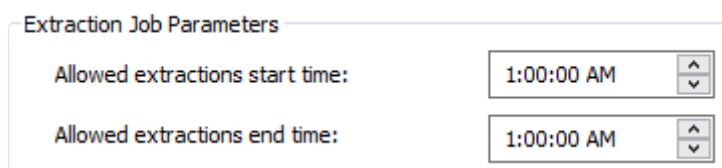
3. Select a data source for your extractions from the drop-down list.
Note: Only ODBC read-only data sources are available.
4. To select the output path for the extracted data, click **Browse**. The **Browse For Folder** dialog box is displayed.



- In the **Browse For Folder** dialog box, navigate to the output directory for the extracted data, and click **OK**. The output path is displayed in the **Select output path** field.

Note The output path can also be typed or pasted directly into the **Select output path** field. The output path can be a UNC path or a local path on the CIC server. Be sure that the IC processes have write access to the output path location.

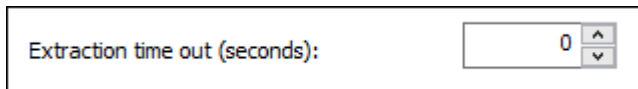
- In the **Extraction Job Parameters** box, set the extraction window start and end times. This window specifies the time frame for when extraction jobs can begin. If you want a 24 hour start-time window, set the start time and end time to the same value.



Notes

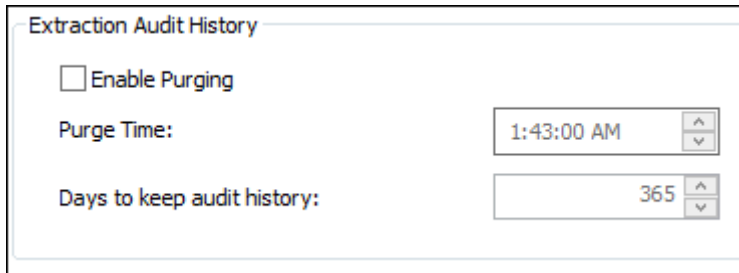
- A queued job will not start if the current time is past the end time and before the start time. The job remains in the queue until the next start time. Also if a job has started before the end time, and is still running when the end time is reached, the job continues running until it is completed or canceled.
- The Data Extractor service running on the CIC server might impact the CPU usage on the CIC server. The SQL utilities that are used by the Data Extractor service will run at below normal priority to minimize the impact to other IC services. Setting the allowed extraction times to off peak hours is another way to minimize CIC server impact.

- The extraction timeout specifies how long an extraction job is allowed to run before being canceled by the server. In the **Extraction Job Parameters** box, set the **Extraction time out**, in seconds.



The default value is set to 0, which results in no timeout.

8. In the **Extraction Audit History** box, set the values for the extraction audit record purge. The audit history is used to populate the extraction job history.

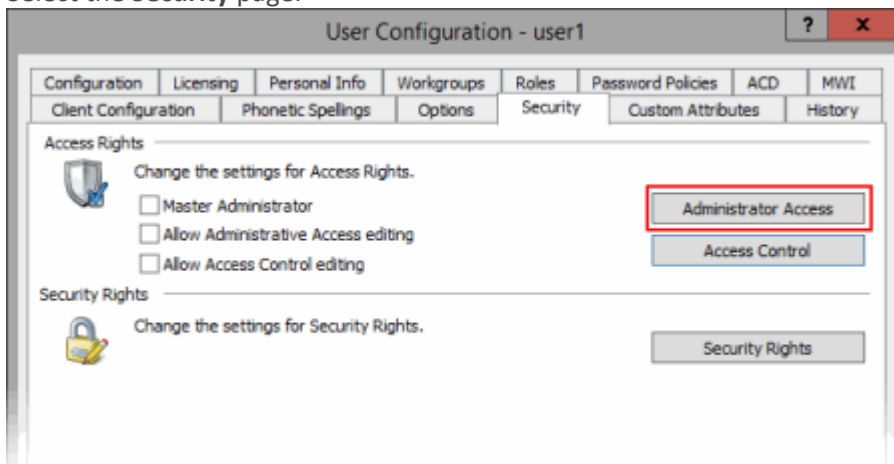


- Purging is disabled by default. To activate purging, select the **Enable Purging** check box.
 - Set the time of day to start the purge process in the **Purge Time** field. We recommend running the purge process during off-peak hours.
 - Set the number of **Days to keep audit history**.
9. Click **OK** or **Apply** on the dialog box to save settings.

Administrator Access

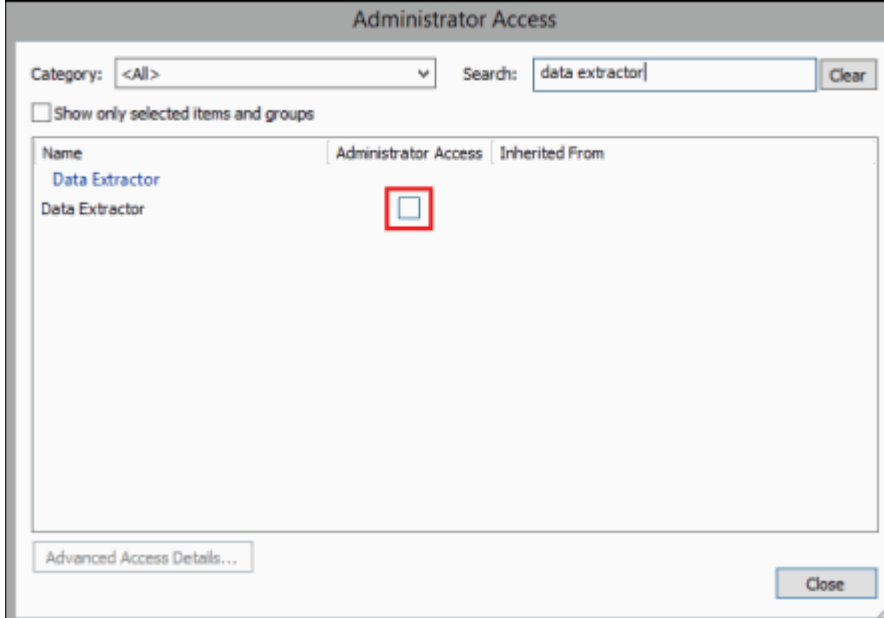
You can assign which user, workgroup, or role has access to configure Interaction Data Extractor. Configure access settings for Data Extractor in Interaction Administrator.

1. From the People container, select Roles, Users, or Workgroups. In the workspace, open a role, user, or workgroup to display its Configuration dialog box.
2. Select the **Security** page.



3. Click **Administrator Access**.

4. In the Administrator Access dialog box, in the **Search** field, type **data extractor**. The Data Extractor rights are displayed.

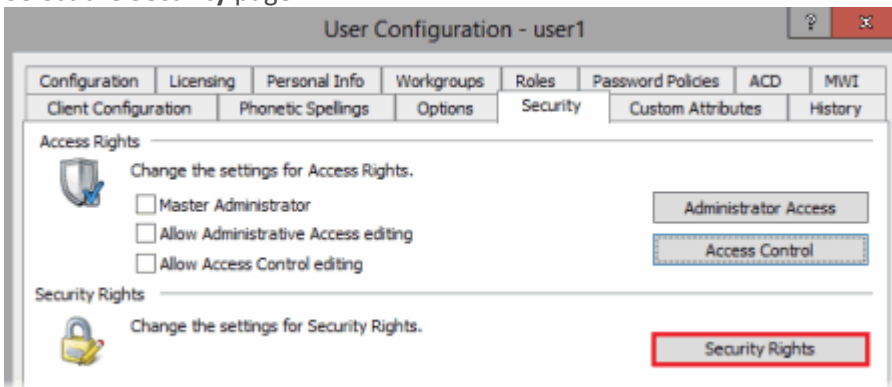


5. To assign the user, workgroup, or role Administrator Access, select the **Data Extractor** check box, or clear the check box to remove Administrator Access.
6. Click **Close**.
7. On the Configuration dialog box, click **OK** or **Apply** to save the settings.

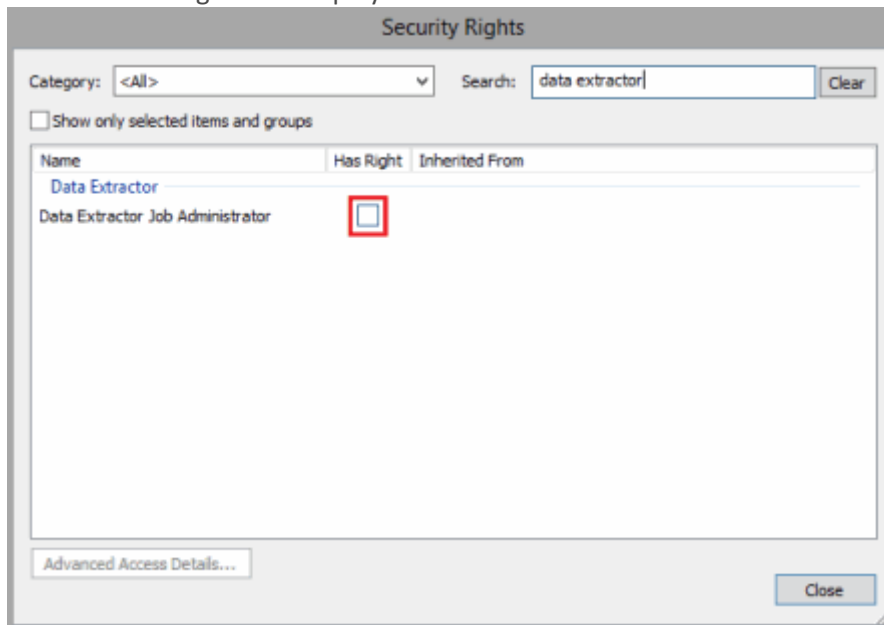
Security Rights

You can assign which user, workgroup, or role has the Security Right **Data Extractor Job Administrator**. This security right allows the user to view the extraction job details for *any* user. This right also allows the user to cancel queued or running jobs that were submitted by another user. Configure Security Rights in Interaction Administrator.

1. From the People container, select Roles, Users, or Workgroups. In the workspace, open a role, user, or workgroup to display its Configuration dialog box.
2. Select the **Security** page.



3. Click **Security Rights**.
4. In the Security Rights dialog box, in the **Search** field, type **data extractor**. The Data Extractor Job Administrator rights are displayed.



5. To assign the user, workgroup, or role Security Rights, select the **Data Extractor Job Administrator** check box., or clear the check box to remove the Security Rights.
6. Click **Close**.
7. On the Configuration dialog box, click **OK** or **Apply** to save the settings.

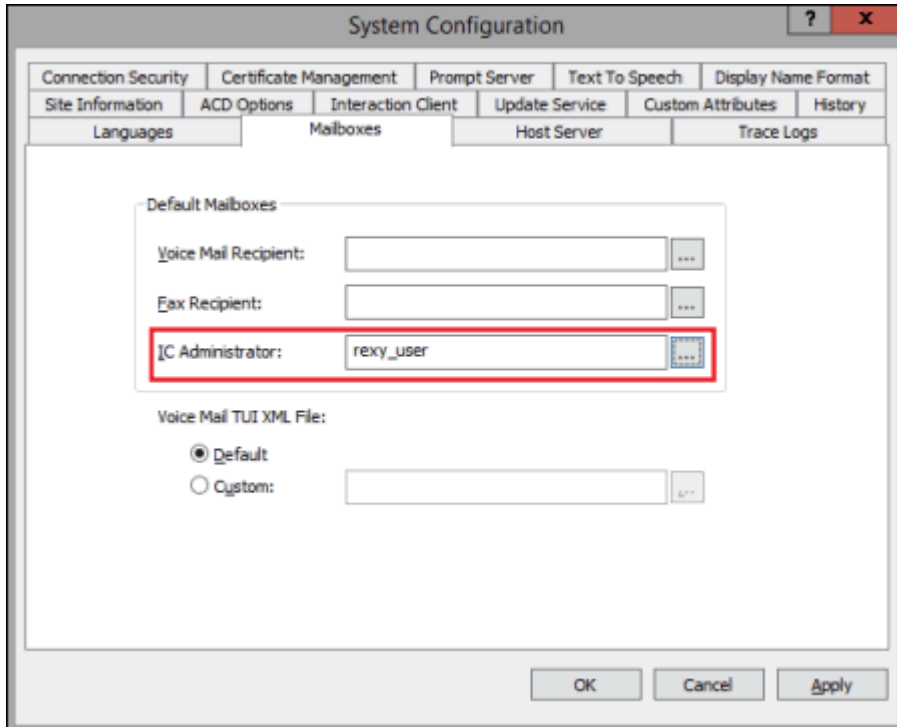
Email Notifications

An email notification can be sent to CIC administrators and users when an extraction job has completed, failed, or was canceled. If an IC Administrator Mailbox is configured, the CIC administrator receives emails for every job. If the data extractor user's Mailbox is configured, the user receives emails for his or her submitted jobs.

Configure Email Notifications for CIC Administrators

1. Open Interaction Administrator.
2. From the **System Configuration** container, double-click **Configuration** in the workspace to display the System Configuration dialog.

3. Click the **Mailboxes** tab and configure the mailbox to use for the **IC Administrator**.



4. Click **OK** or **Apply** to save changes.

Configure Email Notifications for CIC Users

1. Open Interaction Administrator.
2. In the **People** container, from the **Users** subcontainer, double-click the user to configure their mailbox.

3. Click the **Configuration** tab and configure **Mailbox User** for the user.

The screenshot shows the 'User Configuration - user1' dialog box with the following fields and values:

- Client Configuration: Configuration (selected), Licensing, Personal Info, Workgroups, Roles, Password Policies, ACD, MWI
- Extension: 10001
- Mailbox User: rexy_user (highlighted with a red box)
- Password: [Redacted]
- Confirm Password: [Redacted]
- Preferred Language: <System Default>
- IC Privacy Name: [Empty]
- Default Workstation: station1
- Outbound ANI: [Empty]
- NT Domain User: dev2000\user1
- Exclude From Directory:
- Location: <Default Location>
- Time Zone: (UTC-05:00) Eastern Time (US & Canada)
- Use Location Time Zone:
- Microsoft Lync Settings: User Address, Line URI, Enable Presence Synchronization, Lookup Settings, User Type: Enterprise Voice
- Current Status: Available
- Home Site: 1 (rexy)
- Current Site: <Not Set>

Buttons at the bottom: OK, Cancel, Apply. A checkbox for 'Confirm auto-save' is checked.

4. Click **OK** or **Apply** to save changes.

Starting Data Extractor

Starting Data Extractor

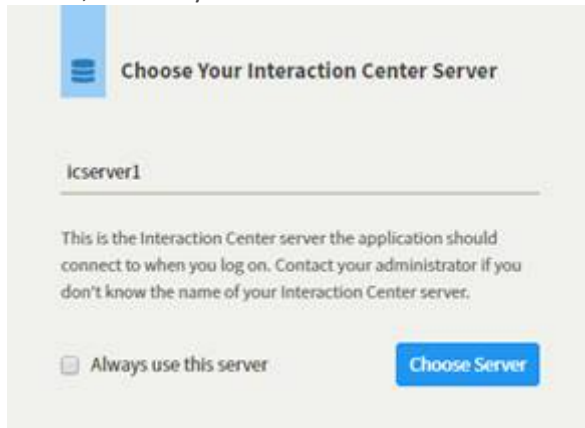
For information on logging on to Data Extractor, see the topics below **Starting Data Extractor**.

Logging On

You can log on to Interaction Data Extractor from your browser. Your CIC administrator can give you the URL for the logon page. If you have questions about any of the required entries, click the Help link in the Application bar.

1. Point your browser to the Data Extractor logon page. You choose an CIC server at your initial log on, even if only one CIC server is available.

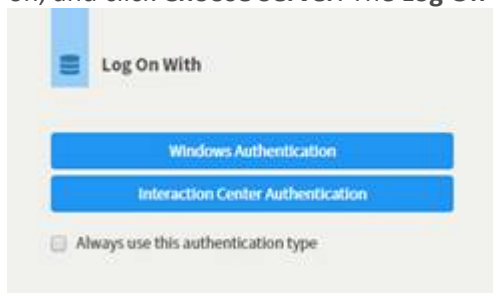
Select your CIC server the Data Extractor connects to when you log on. If your organization uses more than one CIC server, you can choose a server. If you do not know the name of your CIC server, contact your CIC administrator.



Note: If available in the logon page on the Application Bar, click the name of the currently selected server.



2. In the **Choose Your Interaction Center Server** dialog box, select a server from the Server drop-down list, *or* type the name of the CIC server that Data Extractor will connect to when you log on, and click **Choose Server**. The **Log On With** dialog box is displayed.



3. If your CIC administrator has enabled Single Sign On, in the **Log On With** dialog box do one of the following:
 - Click Windows Authentication to use your Windows user ID and password to log on, or
 - Click Interaction Center Authentication to use your CIC user name and password to log on, or
 - Click the button for the alternate Identity Provider configured by your CIC administrator.

Note: The **Log on With** dialog box is available only if you can use more than one type of credentials to log on.

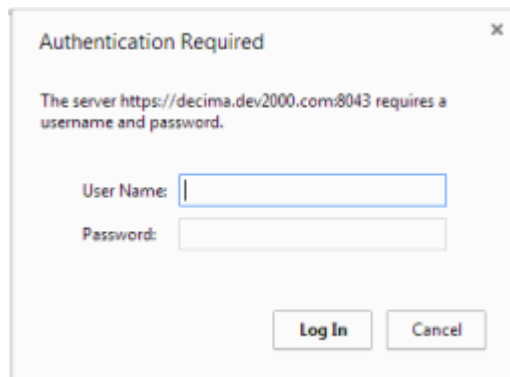
7. Enter the appropriate logon credentials by doing one of the following:
 - If you selected Interaction Center Authentication, enter your CIC User ID and Password as configured in Interaction Administrator. Click **Log On**.

Note: You also see this dialog box if your CIC administrator has *not* enabled Single Sign On.



- If you selected Windows Authentication, in the **Authentication Required** dialog box enter your Windows user name and password. Click **Log In**.

Note: This dialog box does not appear, if your CIC administrator configures your browser to enable Windows credentials to automatically pass to the CIC server. Also, the appearance of this dialog box varies according to the browser you use.

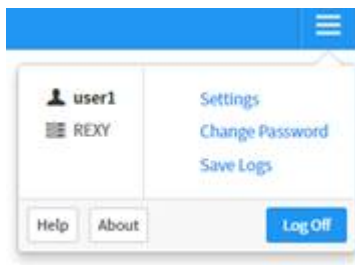


- If you selected another Identity Provider in the **Log on With** dialog box, follow your CIC administrator's instructions for entering credentials and logging on.

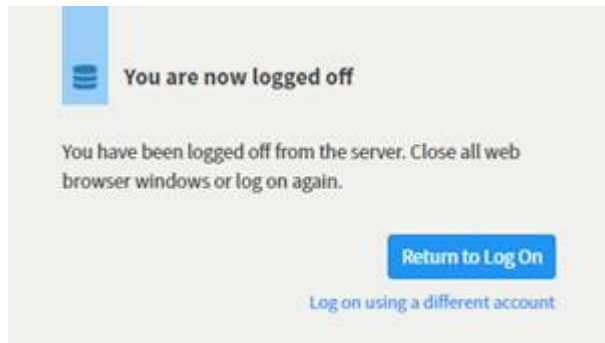
When you log on, the jobs dashboard is displayed. See [Job Status](#) to learn more about the dashboard.

Logging Off

You can log off Interaction Data Extractor by clicking the menu icon, and then click **Log Off**.



You are logged off and the browser window does not close. To log on to Interaction Data Extractor again, click **Return to Log On**.



Exiting

To exit the Interaction Data Extractor application, click the **X** in the upper-right corner of the browser window or on the browser tab.

Managing jobs

Managing Jobs

For information on job status and viewing details of a job, see the topics below **Managing Jobs**.

Job Status

When you log on, the jobs dashboard is displayed. The **Pending Jobs** group shows which extraction jobs are actively running or pending execution. The **Job Execution History** group shows past extraction jobs that have previously executed, including jobs that completed successfully, failed, or have been canceled.

[All Jobs](#)
[Refresh](#)
[New](#)

Pending Jobs

Status	Name	Updated	Owner
--------	------	---------	-------

Job Execution History

Status	Name	Updated	Owner
	Red job	03/31/2017 3:23:07 PM	user2
	Two job	03/31/2017 3:22:37 PM	user2

[More](#)

By default, logged-on users only see their own jobs. Click **All Jobs** to switch between viewing jobs for all users and viewing only your own jobs.

[All Jobs](#)
[Refresh](#)
[New](#)

Pending Jobs

When **All Jobs** are displayed, the All Jobs button turns blue and jobs for all users are displayed in the list.

[All Jobs](#)
[Refresh](#)
[New](#)

Pending Jobs

Status	Name	Updated	Owner
--------	------	---------	-------

Job Execution History

Status	Name	Updated	Owner
	Blue job	03/31/2017 3:31:04 PM	user1
	Red job	03/31/2017 3:23:07 PM	user2
	Two job	03/31/2017 3:22:37 PM	user2
	One job	03/31/2017 3:22:10 PM	user1

[More](#)

Note The 30 most recent extraction jobs are displayed. If more history is required, click **More** to retrieve an additional 30 jobs from the server.

To create a new Data Extractor job, see [Creating a New Job](#).

Viewing Details of a Job

If you own a job or have been assigned the Data Extractor Job Administrator security rights, you are able to see additional details for a job. If additional details are available, the name of the job is in blue. For additional details on the job, click the job name.

✓	New Job	03/31/2017 4:06:29 PM	user2
---	-------------------------	--------------------------	-------

The **Job Details** window displays additional information about the job, including Job ID, Owner, Status, and more.

The Job Details window displays the following information:

Name	New Job
Job ID	392E42A4-5F65-4BD4-9E04-9521E6F045CA
Owner	user2
Status	Finished (03/31/2017 4:06:29 PM)
Duration	2 seconds
Output	\\(morpheus\share)\ext\392E42A4-5F65-4BD4-9E04-9521E6F045CA1490990787241

Progress bar showing three stages: 1. QUEUED, 2. STARTED, 3. COMPLETED.

Date Range: 03/01/2017 12:00:00 AM - 04/01/2017 12:00:00 AM
Site ID(s): 1, 22

Selected Items: [] >

Close

Refreshing Job Status

The pending jobs list updates as jobs are executed.

To refresh the list of jobs and see additional jobs that might have been submitted, click **Refresh**.

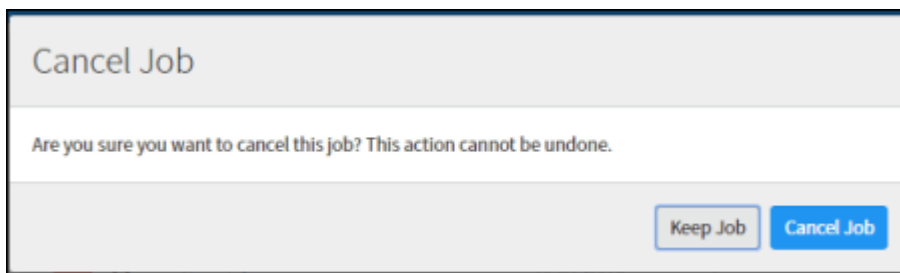


Canceling Jobs

If you own a job or have been assigned the Data Extractor Job Administrator security rights, you are able to cancel a pending job. To cancel a job, click **Cancel** next to the job name.



On the **Cancel Job** confirmation dialog, click **Cancel Job**.



Extracting data

Extracting Data

See the topics below **Extracting data** to create a new job and extract data from the CIC database tables.

Creating a New Job

To create a new Data Extractor job, click **New**.



The Data Extractor Job creation wizard opens.

Follow the steps in the job creation wizard to create a new data extraction job.

For more information, see [Extraction Job Wizard](#).

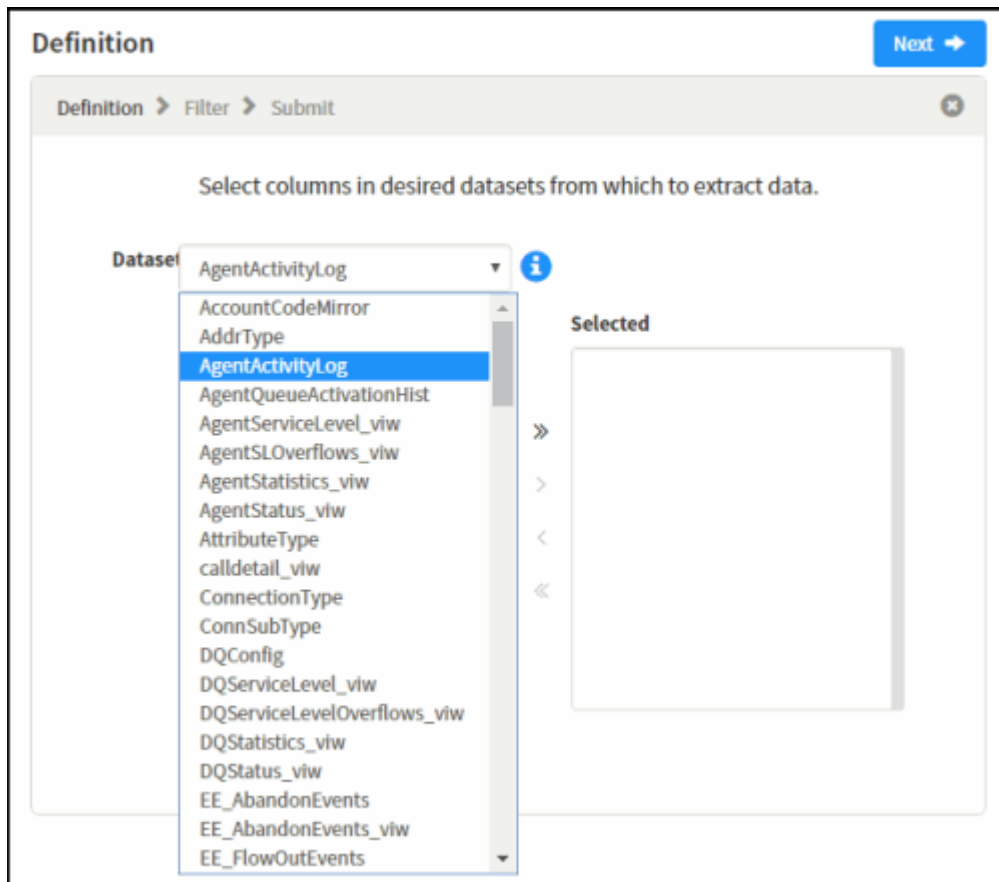
Extraction Job Wizard

The Extraction Job Wizard guides you through the process of creating a new data extraction job. You can cancel a job creation, before submitting, by clicking the **X** in the navigation bar.

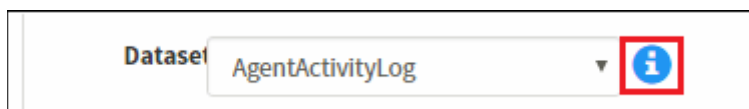


Defining a new job

1. On the **Definition** page, select a dataset from which you want to extract data. Datasets are tables or views in the CIC database.



- For details about the selected dataset, click the **View Dataset Description** information icon.



- For details on a dataset column, select the column. A description of the column is displayed.

Definition

Next →

Definition > Filter > Submit

Select columns in desired datasets from which to extract data.

Dataset AgentActivityLog ⓘ

Type to filter columns

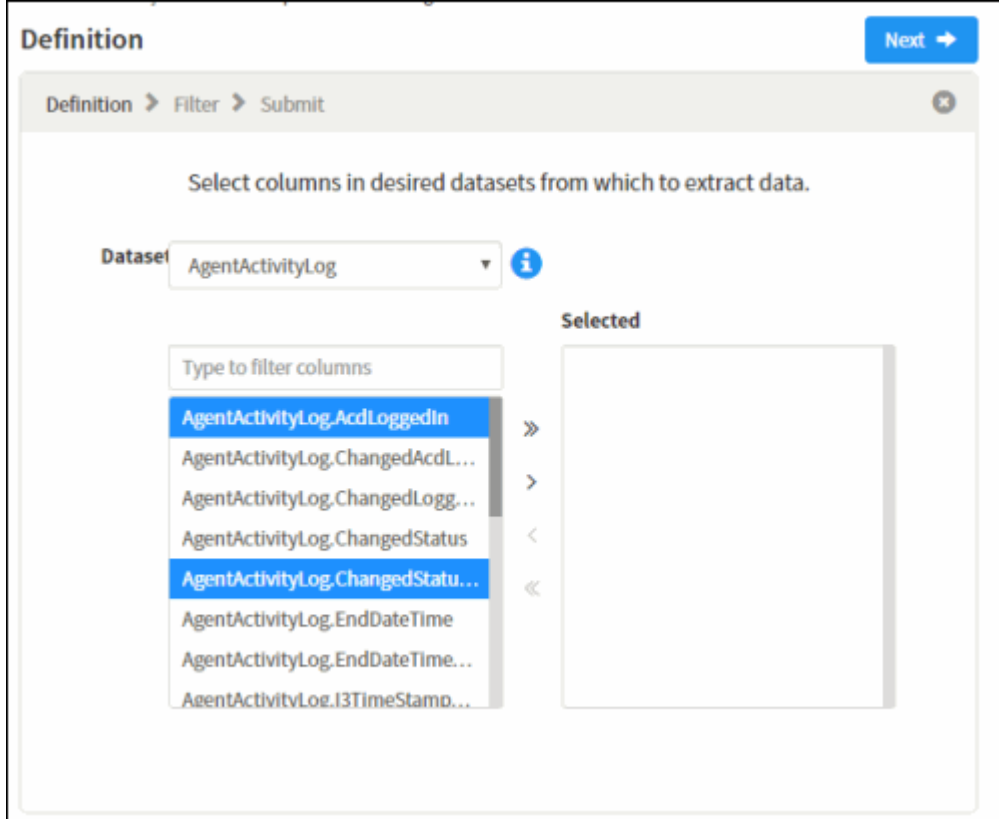
- AgentActivityLog.AcdLoggedIn >>
- AgentActivityLog.ChangedAcdL... >
- AgentActivityLog.ChangedLogg... >
- AgentActivityLog.ChangedStatus <
- AgentActivityLog.ChangedStatu... <<
- AgentActivityLog.EndDateTime
- AgentActivityLog.EndDateTime...
- AgentActivityLog.I3TimeStam...

Selected

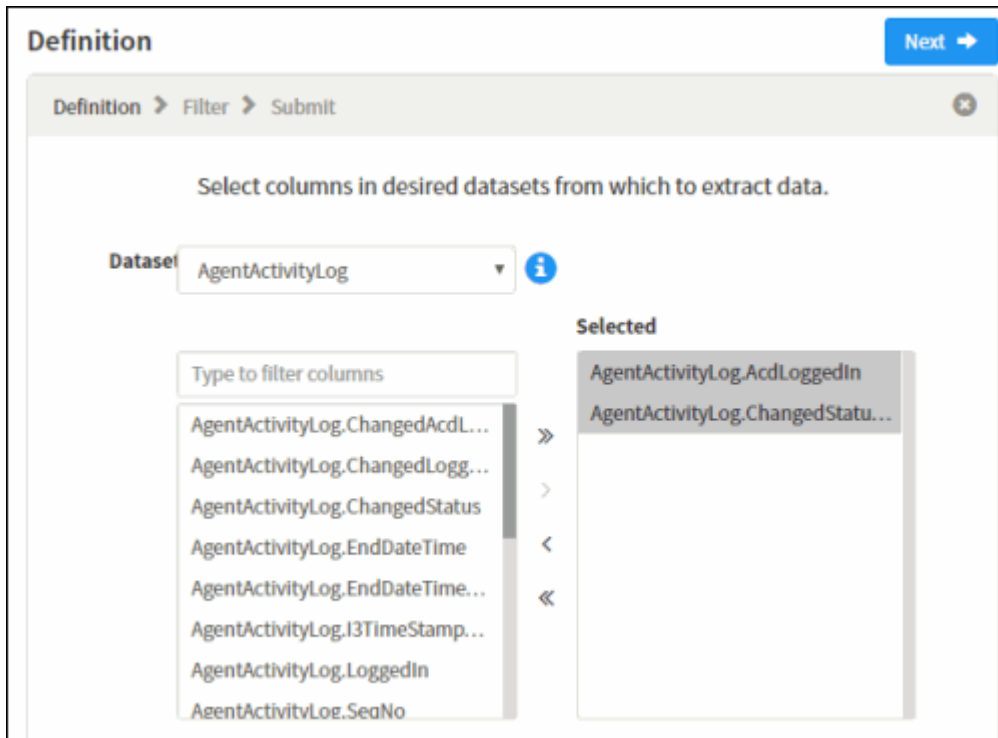
Logged In Agent's ACD State Changed

Flag indicating that the Agent's ACD logged in state changed in this state as compared to the previous state. 0 = No change, 1 = Changed.

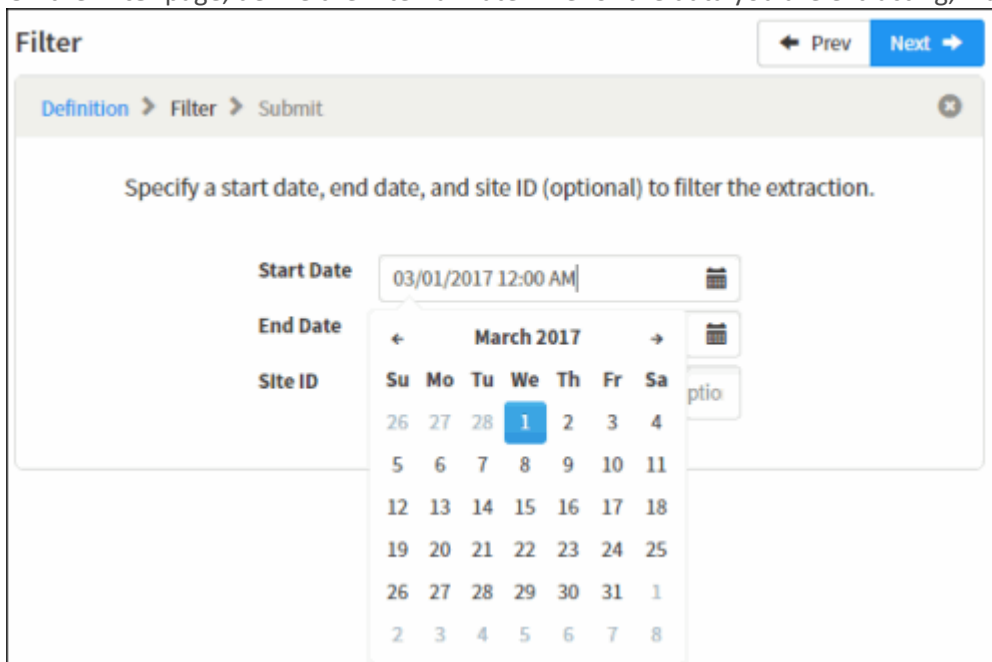
- From a dataset, select the columns to be extracted. You can select multiple columns using Ctrl+Click or Shift+Click.



- Next, move the selected columns to the **Selected** pane. To move selected columns:
 - Click > to move the selected columns to the Selected pane.
 - Click >> to move All columns, for the selected dataset, to the Selected pane.
 - To remove a selected column from the Selected pane, click < for selected, or << for all.



4. If you want to extract additional columns from another dataset, select a dataset from the **Dataset** picker, and repeat the column selection process.
5. To continue, click **Next**.
6. On the **Filter** page, define the interval DateTime for the data you are extracting, if applicable.



Filter DateTimes are *lower bounds inclusive* and *upper bounds exclusive*. For example, with a **Start Date** of "3/01/2017 12:00AM" and an **End Date** of "04/01/2017 12:00 AM," the resulting

query will be filtered by "dateColumn >= '2017-03-01 00:00' AND dateColumn < '2017-04-01 00:00.'"

7. Type the **Site ID** for the sites to extract data from, if applicable.

Filter ← Prev Next →

Definition > Filter > Submit

Specify a start date, end date, and site ID (optional) to filter the extraction.

Start Date 03/01/2017 12:00 AM

End Date 04/01/2017 12:00 AM

Site ID × 1 × 22 333

333

Note Site IDs are optional. If the field is empty, data for all sites is extracted.

8. To continue, click **Next**.
9. On the **Submit** page, review your job configuration. You can click on **Selected Items** to review selected datasets and columns.

Submit ← Prev Submit →

Definition > Filter > Submit

Name job and submit selections for extraction.

Name Enter job name

Date Range 03/01/2017 12:00 AM - 04/01/2017 12:00 AM

Site ID(s) 1,22

Selected Items >

10. Type a relevant name to identify the extraction job. Extraction job names are limited to 100 characters

Submit ← Prev Submit →

Definition > Filter > Submit

Name job and submit selections for extraction.

Name New Job

Date Range 03/01/2017 12:00 AM - 04/01/2017 12:00 AM

Site ID(s) 1,22

Selected Items ▼

Tables

- AgentActivityLog
 - AcdLoggedIn
 - ChangedStatusGroup

Note Job names do not need to be unique. A unique job ID is assigned when the extraction job is created. This job ID can be obtained by viewing details for the job from the jobs dashboard. Extracted data will be written to a folder named similar to the job ID. The folder is located in the output location configured by your administrator.

11. To continue, click **Submit**. Click **Submit** again on the **Submit Job** confirmation dialog to send the job to the server and queue it for extraction.

Submit Job

Complete configuration and submit job for extraction?

Cancel Submit

Note The data extractor subsystem creates a child process that connects to the database server and executes the extraction query. The child process runs at below normal priority. If the server is busy or under heavy load, the extraction process might delay in starting or take longer than expected.

For information about receiving an email on job status, see [Email Notifications](#).

Output Format

The CSV output of the Data Extractor conforms to RFC4180. The definition of this standard is found at:

<https://tools.ietf.org/html/rfc4180>

Additional information

Additional Information

For more information on the Extractor Job Audit Table, and more, see the topics below **Additional Information**.

Extractor Job Audit Table

The Data Extractor application uses a table in the database to track submitted jobs, the configuration for jobs, and the various states of a job. Administrators can also query this table to find historical job information that is not presented in the application.

Data Dictionary

The Interactive Intelligence *PureConnect Data Dictionary Technical Reference* provides a concise and detailed description of the database tables CIC uses to store and generate reports on historical data. This includes information stored for interactions, queue statistics, agent and user activity, line and line groups, administrative changes, and other Interaction Administrator configuration information.

The Data Dictionary assists you in understanding the structure and contents of CIC tables. The Data Dictionary can be accessed from the PureConnect Documentation Library on the Genesys website at <http://help.genesys.com/cic>

Save Logs

Your CIC administrator can set a server parameter in Interaction Administrator that hides the Save Logs command. Contact your CIC administrator for details.

If you experience a problem, you can generate an Interaction Data Extractor client log file, attach it to an email message, and send it your PureConnect Customer Care representative.

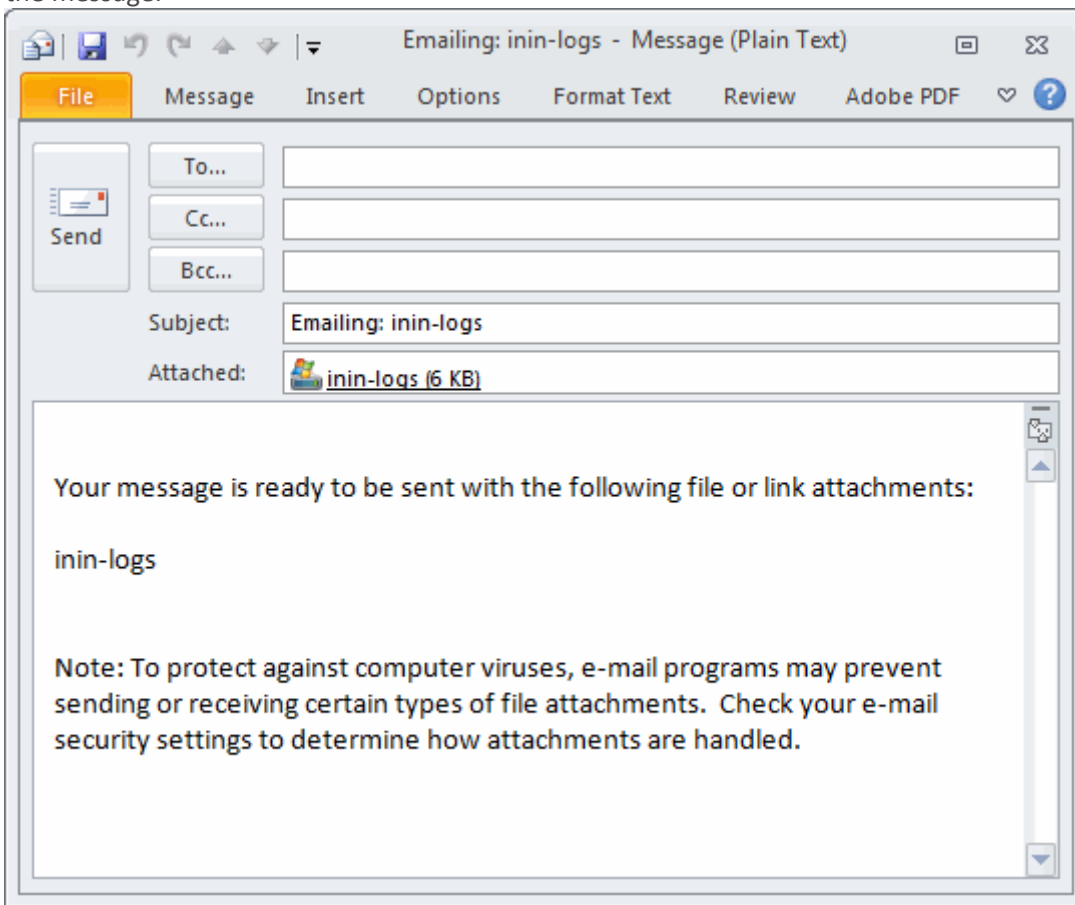
To generate a log file, from Interaction Data Extractor:

1. Click the menu icon and then click **Save Logs**.



The Interaction Data Extractor client generates a log file named `inin-logs.txt` and places it in your browser's Downloads directory. If you previously created this file, the Data Extractor client appends a number to the log file name.

2. In your Windows Downloads directory, right-click the file and select **Send to > Mail recipient**. A new email message opens in your default email program. The selected log file is attached to the message.



3. Supply any other useful information or comments in the email message.
4. Address the message to your PureConnect Customer Care representative or other designated person, and click **Send**.

Note Contact your CIC administrator for the email address for all of your company's problem reports.

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