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See Change Log for summary of changes.



# **Interaction Data Extractor**

## **Printed Help**

#### **Abstract**

This document contains the application help for Interaction Data Extractor.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/cic.

For copyright and trademark information, see

https://help.genesys.com/cic/desktop/copyright\_and\_trademark\_information.htm.

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### 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 <a href="http://testlab.genesys.com/ProductsPage.aspx?ProductType=9">http://testlab.genesys.com/ProductsPage.aspx?ProductType=9</a>

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 <a href="https://my.inin.com/products/selfhelp/kb/\_layouts/listform.aspx?">https://my.inin.com/products/selfhelp/kb/\_layouts/listform.aspx?</a>
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#### **SOL 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. SQLCMD must be installed on the CIC server.

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

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.

#### Note

When you are installing SQLCMD, you might receive the following error:



Setup is missing an installation prerequisite:
-Microsoft ODBC Driver 11 for SQL Server. To continue, install Microsoft ODBC Driver 11 for SQL Server and then run the Setup operation again

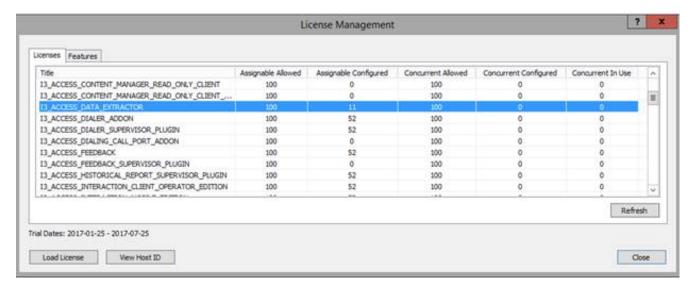
If you receive this error, you need to install Microsoft ODBC Driver 11 for SQL Server. For information, see <a href="https://www.microsoft.com/en-us/download/details.aspx?id=36434">https://www.microsoft.com/en-us/download/details.aspx?id=36434</a>.

## **Configuration**

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

### Licensing

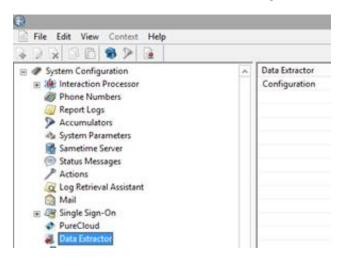
The Interaction Data Extractor requires an access license. To verify if you have the proper license, go to the License Management form in Interaction Administrator and look for the I3\_ACCESS\_DATA\_EXTRACTOR license.



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

### **Data Extractor Settings**

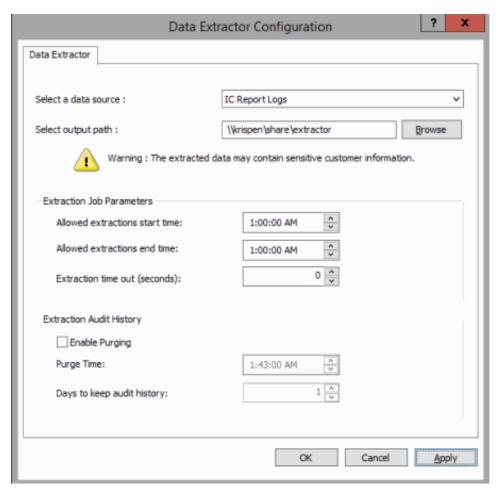
To use the Interaction Data Extractor tool, configure the Data Extractor settings in Interaction Administrator.



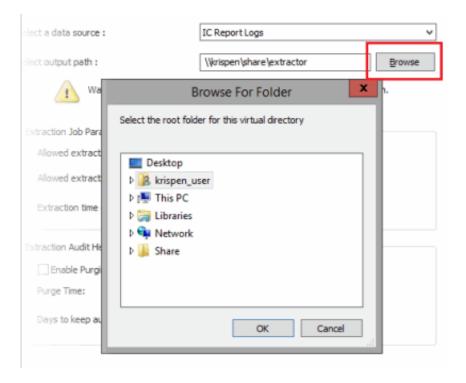
#### **Configuring Data Extractor**

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.



- 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.



5. 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.

6. 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.

Extraction Job Parameters		
Allowed extractions start time:	1:00:00 AM	<b>^</b>
Allowed extractions end time:	1:00:00 AM	<u>^</u>

#### 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.
- 7. 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.

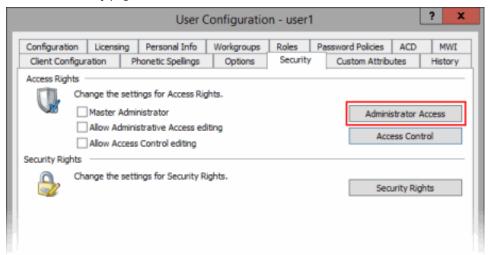


- Purging is disabled by default. To activate purging, select the Enable Purging check box.
- Set the time of day to start the purge process in the **Purge Time** field. We recommend running the purge process during off-peak hours.
- Set the number of Days to keep audit history.
- 9. Click **OK** or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

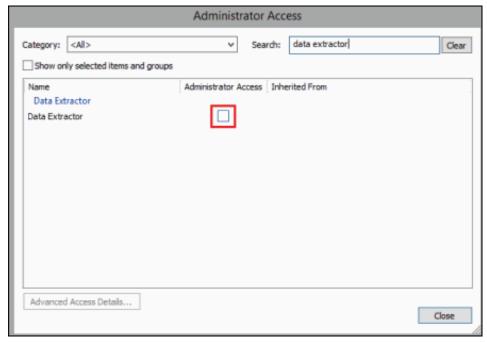
#### **Administrator Access**

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.

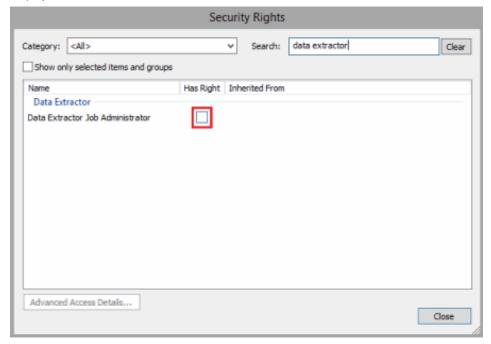
### **Security Rights**

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.
- 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.



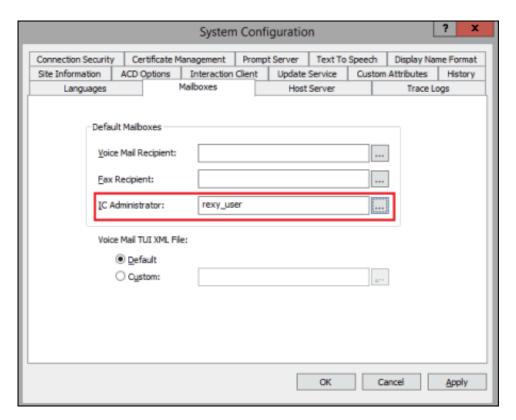
- 5. To assign the user, workgroup, or role Security Rights, select the **Data Extractor Job Administrator** check box., or clear the check box to remove the Security Rights.
- 6. Click Close.
- 7. On the Configuration dialog box, click **OK** or **Apply** to save the settings.

### **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

### **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.

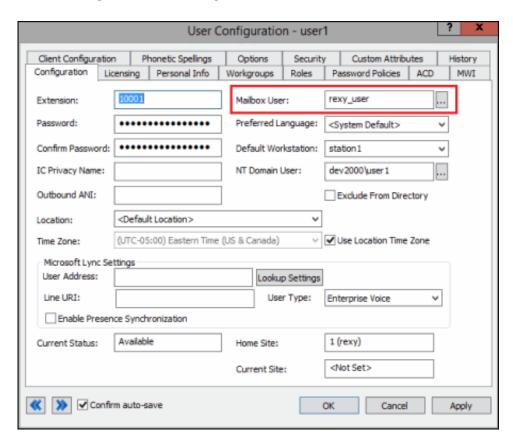


4. Click OK or Apply to save changes.

### **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.



4. Click OK or Apply to save changes.

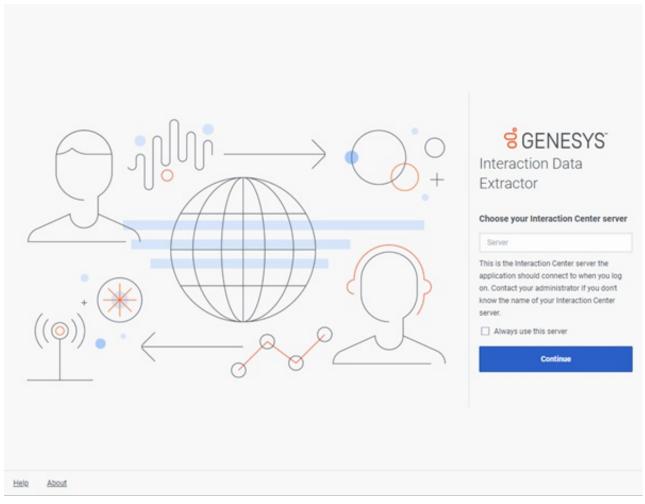
## **Starting Data Extractor**

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

### **Logging On**

Log on to Interaction Data Extractor from your browser. Your CIC administrator can give you the URL for the logon page.

1. Point your browser to the Data Extractor logon page.



2. On the Interaction Data Extractor logon page type the name of the Interaction Center server you want the application to connect to when you log on. Contact your administrator if you do not know the name of your Interaction Center server. Click **Continue**, and if your CIC administrator has enabled Single Sign On, the **Log on with** dialog page is displayed.

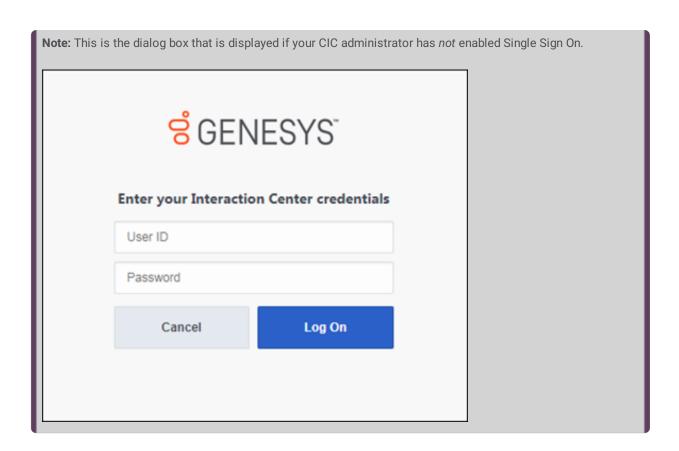


By default, Windows Authentication and Interaction Center Authentication are available.

- 3. On the Log on with dialog page, click one of the following:
  - Windows Authentication to use your Windows User ID and Password to log on
  - Interaction Center Authentication to use your CIC user name and password to log on

#### Notes

- The **Log on with** dialog page is only displayed if you can use more than one type of credentials to log on.
- If your CIC administrator has configured other Identity Providers in Interaction Administrator, you might have other available options on the **Log on with** page.
- 4. Depending on the chosen authentication method, enter the appropriate logon credentials.
- If you selected Interaction Center Authentication, enter your CIC User ID and Password as configured in Interaction Administrator. Click **Log 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.

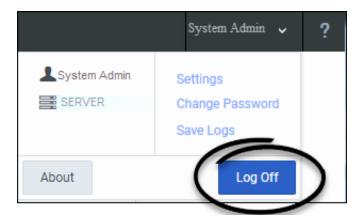


• If you selected another Identity Provider in the **Log on with** dialog box, follow your CIC administrator's instructions for entering credentials and logging on.

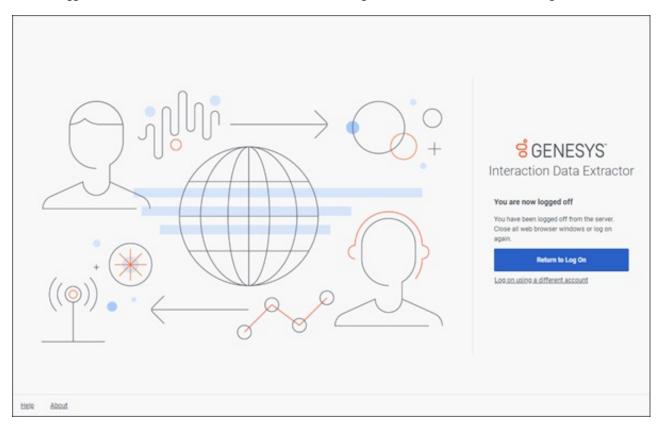
When you log on, the jobs dashboard is displayed. See <u>Job Status</u> to learn more about the dashboard.

## **Logging Off**

To log off Interaction Data Extractor, click your user name, and on the menu, 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**

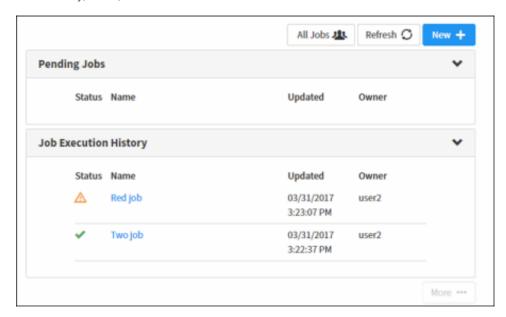
For information on job status and viewing details of a job, see the topics below Managing Jobs.

### **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.

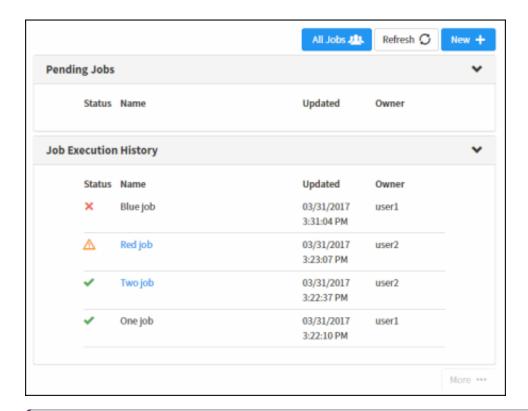
The **Job Execution History** group shows past extraction jobs that have previously executed, including jobs that completed successfully, failed, or have been canceled.



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.



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



**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.



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



### **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.

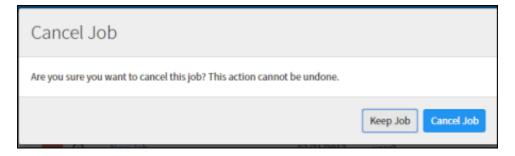


## **Canceling Jobs**

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**

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.

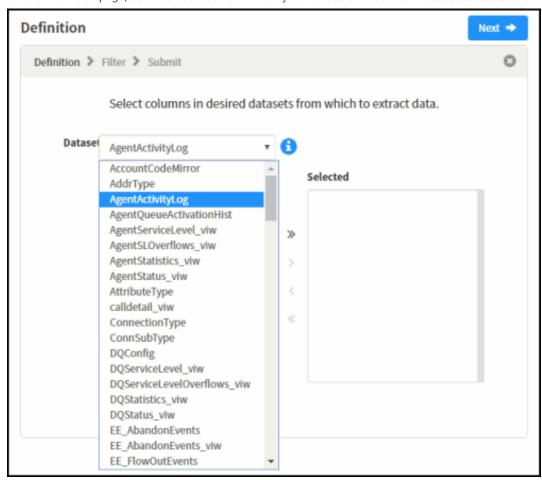
### **Extraction Job Wizard**

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

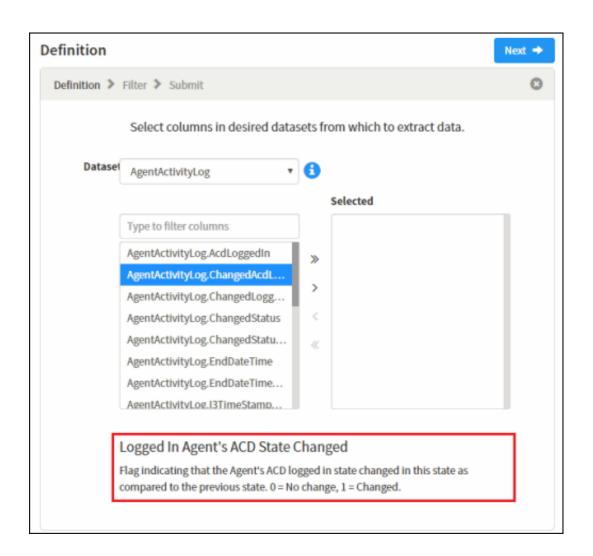
1. On the **Definition** page, select a dataset from which you want to extract data. Datasets are tables or views in the CIC database.



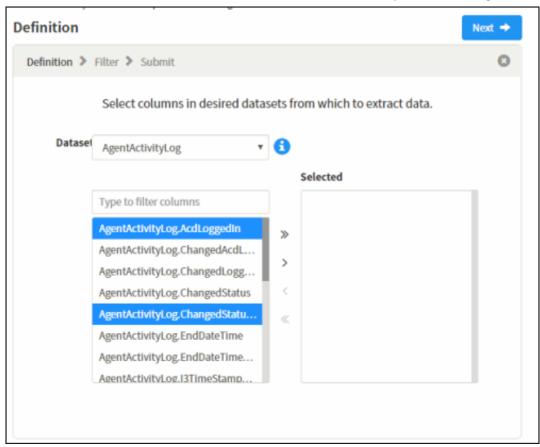
For details about the selected dataset, click the View Dataset Description information icon.



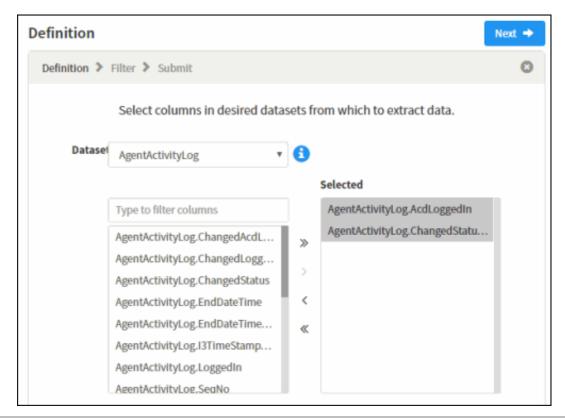
For details on a dataset column, select the column. A description of the column is displayed.



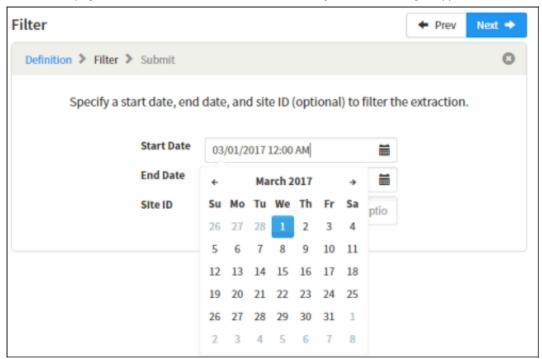
2. From a dataset, select the columns to be extracted. You can select multiple columns using Ctrl+Click or Shift+Click.



- 3. 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.

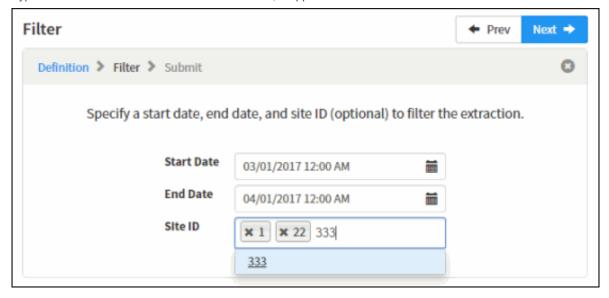


- 4. If you want to extract additional columns from another dataset, select a dataset from the **Dataset** picker, and repeat the column selection process.
- 5. To continue, click Next.
- 6. On the Filter page, define the interval DateTime for the data you are extracting, if applicable.



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.'"

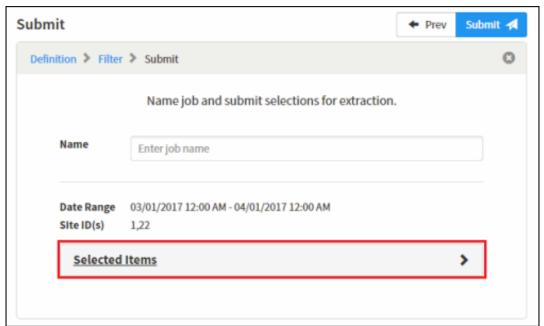
7. Type the Site ID for the sites to extract data from, if applicable.



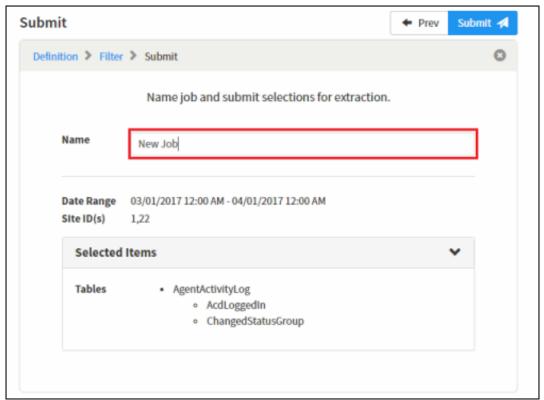
Note Site IDs are optional. If the field is empty, data for all sites is extracted.

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.

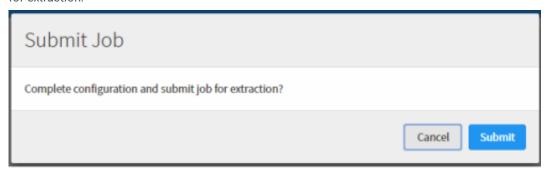


10. Type a relevant name to identify the extraction job. Extraction job names are limited to 100 characters



**Note** Job names do not need to be unique. A unique job ID is assigned when 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 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.



**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: <a href="https://tools.ietf.org/html/rfc4180">https://tools.ietf.org/html/rfc4180</a>

### **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 *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 <a href="http://help.genesys.com/cic">http://help.genesys.com/cic</a>

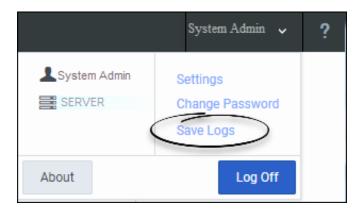
### **Save Logs**

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:

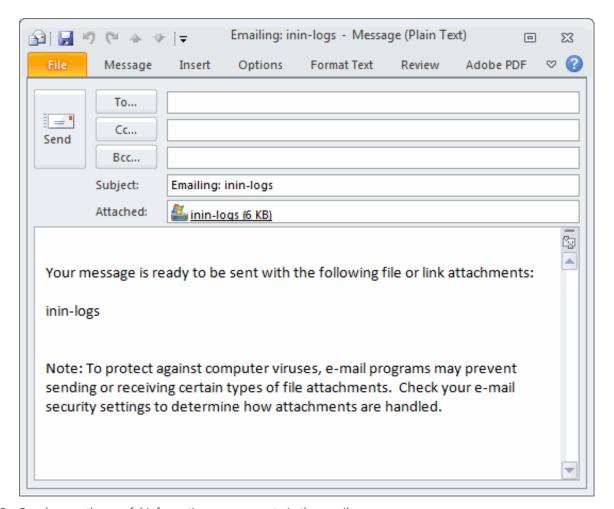
1. Click your user name, and then click Save Logs.



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.

# **Miscellaneous topics**

## **Canceling a New Job**

To create a data extraction job, you must create a new job configuration. This is done by clicking the new job button from the job status page.



This should take you to the extraction type page, seen below.



### **Feature**

The Interaction Data Extractor is a simple web-based tool that allows you to extract data from CIC database tables.

# **Change log**

Date	Changes
08-March-2019	Created this change log.