



PureConnect®

2020 R2

Generated:

05-May-2020

Content last updated:

31-July-2019

See [Change Log](#) for summary of changes.



Data Privacy Request Tool

Administrator's Guide

Abstract

The PureConnect Data Privacy Request (PDPR) tool enables owners of the PureConnect database to search for personal identifiable information (PII) data and then permanently anonymize that information in the database to help comply with GDPR regulations. This documentation explains how to install and use the PDPR tool.

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.

Table of Contents

Table of Contents	2
Download and Install the PureConnect Data Privacy Tool	3
Related tasks:	3
Use the PureConnect Data Privacy Request Tool	4
Start the PDPR tool	4
Note: The PDPR Tool requires Master Administrator and View User Queue access rights to log in and anonymize data.	4
Connect to the database	4
Search for relevant PII data	5
Single Request	5
Multiple Request	6
Generate a report	8
Select records and anonymize data	8
Enter a service request number	9
Related Topics:	9
PureConnect Data Privacy Request Tool	10
Related tasks:	10
Audit Trail Table	11
Related Topics	11
Change Log	12

Download and Install the PureConnect Data Privacy Tool

Log in to the PureConnect Product Information site and download the PureConnect Data Privacy Tool via the [PureConnect Utilities and Downloads](#) page. This page hosts the latest version of the utility for general use.

1. Click on the PDPR Tool link to save the PDPR_XXXX.zip file on an IC server or on a workstation with access to an IC server.
2. Extract all files from the .zip file to any location with network access to the IC server, or on the IC server itself.

Starting with PDPR Tool version 2.3.3, the PDPR utility requires Master Administrator and View User Queue access rights to log in and anonymize data.

Related tasks:

[Use the PureConnect Data Protection Request tool](#)

Use the PureConnect Data Privacy Request Tool

To use the PureConnect Data Privacy Request tool to anonymize PII data in the PureConnect database:

- Start the PDPR tool
- Connect to the database
- Search for relevant PII data
- Generate a report to show the data that will be anonymized
- Select the records to anonymize, replacing PII data with "XXXX" characters
- Enter a service request number

No additional license is required to run this tool.

Start the PDPR tool

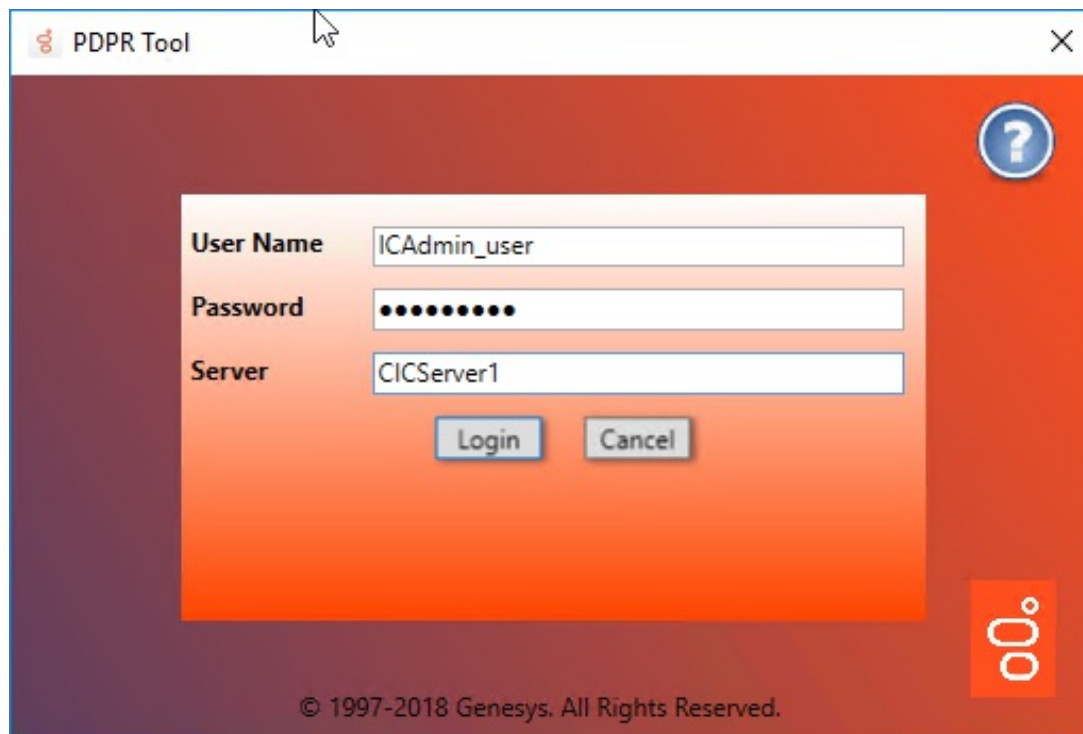
1. Open the folder where the PDPR_XXX.zip file was extracted and open the Release folder.
2. Double-click on the PDPRMTool.exe file to start the tool.

The PDPR Tool login dialog appears.

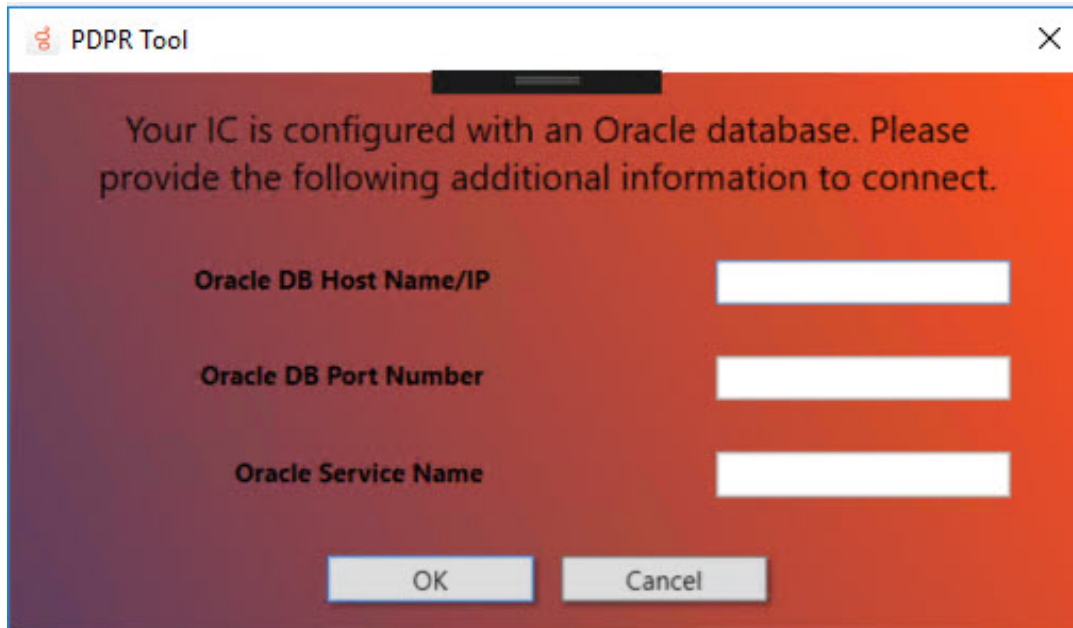
Note: The PDPR Tool requires Master Administrator and View User Queue access rights to log in and anonymize data.

Connect to the database

For sites using Microsoft SQL Server, a CIC Administrator with appropriate access rights can log in with the appropriate CIC user name and password and the name of the primary CIC production server.



For sites using Oracle, the CIC Administrator or the DBA must also provide the Oracle database host name or IP address, the Oracle database port number, and the Oracle service name.



Once the credentials are validated, the main PDPR Tool interface appears.

Search for relevant PII data

PII fields for PureConnect, Dialer, Recorder, Quality Manager, Analytics and Tracker products in the database are listed in *Chapter 9: General Data Privacy Regulations (GDPR)* in the [PureConnect Security Precautions Technical Reference](#) document (requires login to access).

You can search for individual (single) records or multiple records at the same time.

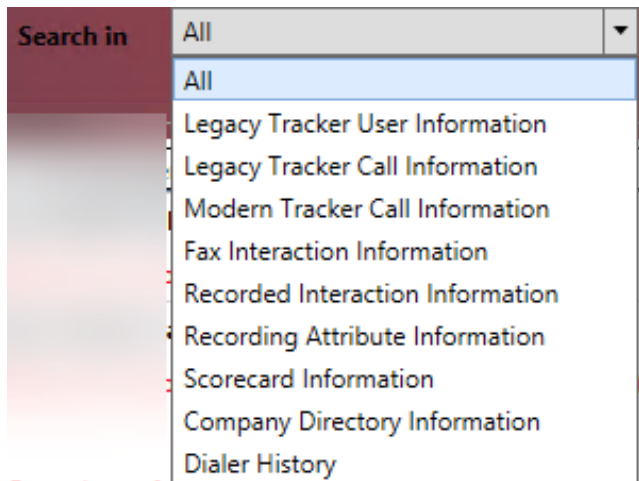
Single Request

Select the **Single Request** option and enter known PII data in the named fields, then click the **Search** button to return records with PII data to anonymize.

The **First Name**, **Last Name**, and **Street Address** fields cannot be used alone; each of those fields requires at least one additional field to have a value to search.

Note: Version 2.2.0 introduced a variable "TrackerEnabled" in the PDPRTTool.exe.config file, which is set to "true" in the default case that all user data is included in the database. You can set "TrackerEnabled" to "false" when tables do not include user information such as First Name, Last Name and Address. If "TrackerEnabled" is set to "false", be sure to include email and phone number data in the search criteria, for better performance.

You can limit the search to the particular database table that contains the type of data you are searching for. The **Search In** drop-down list lets you scope the search to that part of the database.



Records not found for Modern Tracker Call Information

By default, the PDPR Tool limits search results to 400 rows. If your search exceeds that amount, the tool displays a message "Search returned too many records. Please refine your search criteria."

The search results limit is set in the PDPRTool.exe.config file, which is in the directory with the PDPRToolM.exe file. Edit this .config file to change the **MaximumRowsBindToGrid** value to a larger number, restart the PDPR Tool, and run the search again.

Search Criteria	Search Results																							
Search Criteria ☒ Single Request ☐ Multiple Requests First Name: Last Name: Street Address: Phone Number: E-Mail: Search in: All Search Clear	Search Results Legacy Tracker User Information:- Count:- 1 <table border="1"> <thead> <tr> <th>FirstName</th> <th>LastName</th> <th>Value</th> <th>StreetAddress</th> </tr> </thead> <tbody> <tr> <td>env4_sim@inilab.com</td> <td>-</td> <td>env4_sim@inilab.com</td> <td></td> </tr> </tbody> </table> Legacy Tracker Call Information:- Count:- 554 Search returned too many records. Please refine your search criteria. Modern Tracker Call Information:- Count:- 553 Search returned too many records. Please refine your search criteria. Records not found for Modern Tracker Call Information (Interaction Segment Detail) Fax Interaction Information:- Count:- 0 Records not found for Fax Interaction Information Recorded Interaction Information:- Count:- 2 <table border="1"> <thead> <tr> <th>FromConnValue</th> <th>ToConnValue</th> <th>DisplayName</th> <th>ConnValue</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>ENV4_sim@inilab.com</td> <td>env4_mail1@inilab.com</td> <td>-</td> <td>ENV4_sim@inilab.com</td> <td></td> </tr> <tr> <td>ENV4_sim@inilab.com</td> <td>env4_mail1@inilab.com</td> <td>env4_mail1@inilab.com</td> <td>env4_mail1@inilab.com</td> <td></td> </tr> </tbody> </table> Recording Attribute Information:- Count:- 0 Records not found for Recording Attribute Information (Custom Attribute) Scorecard Information:- Count:- 0 Records not found for Scorecard Information Company Directory Information:- Count:- 0 Records not found for Company Directory Information Generate Report Anonymize	FirstName	LastName	Value	StreetAddress	env4_sim@inilab.com	-	env4_sim@inilab.com		FromConnValue	ToConnValue	DisplayName	ConnValue	Notes	ENV4_sim@inilab.com	env4_mail1@inilab.com	-	ENV4_sim@inilab.com		ENV4_sim@inilab.com	env4_mail1@inilab.com	env4_mail1@inilab.com	env4_mail1@inilab.com	
FirstName	LastName	Value	StreetAddress																					
env4_sim@inilab.com	-	env4_sim@inilab.com																						
FromConnValue	ToConnValue	DisplayName	ConnValue	Notes																				
ENV4_sim@inilab.com	env4_mail1@inilab.com	-	ENV4_sim@inilab.com																					
ENV4_sim@inilab.com	env4_mail1@inilab.com	env4_mail1@inilab.com	env4_mail1@inilab.com																					

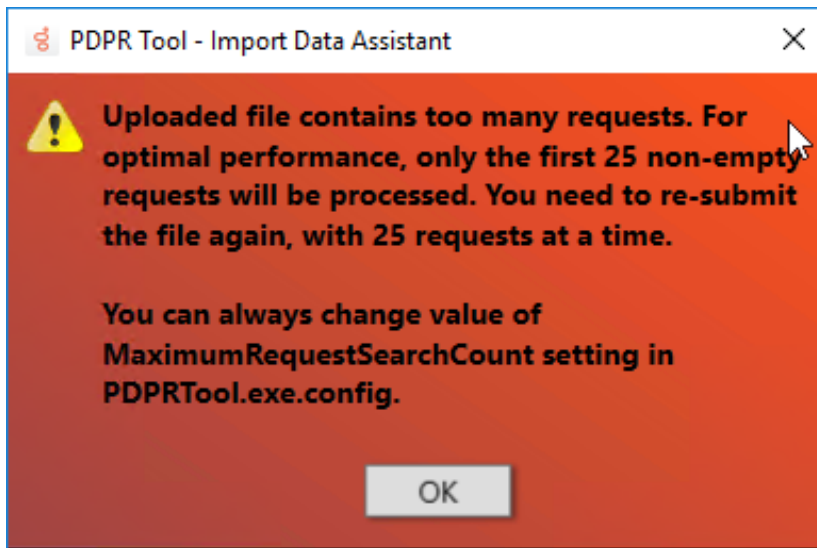
Multiple Request

To search for more than one user's PII data request at a time, click the **Multiple Request** option and use the built-in spreadsheet template to populate with multiple rows of user data.

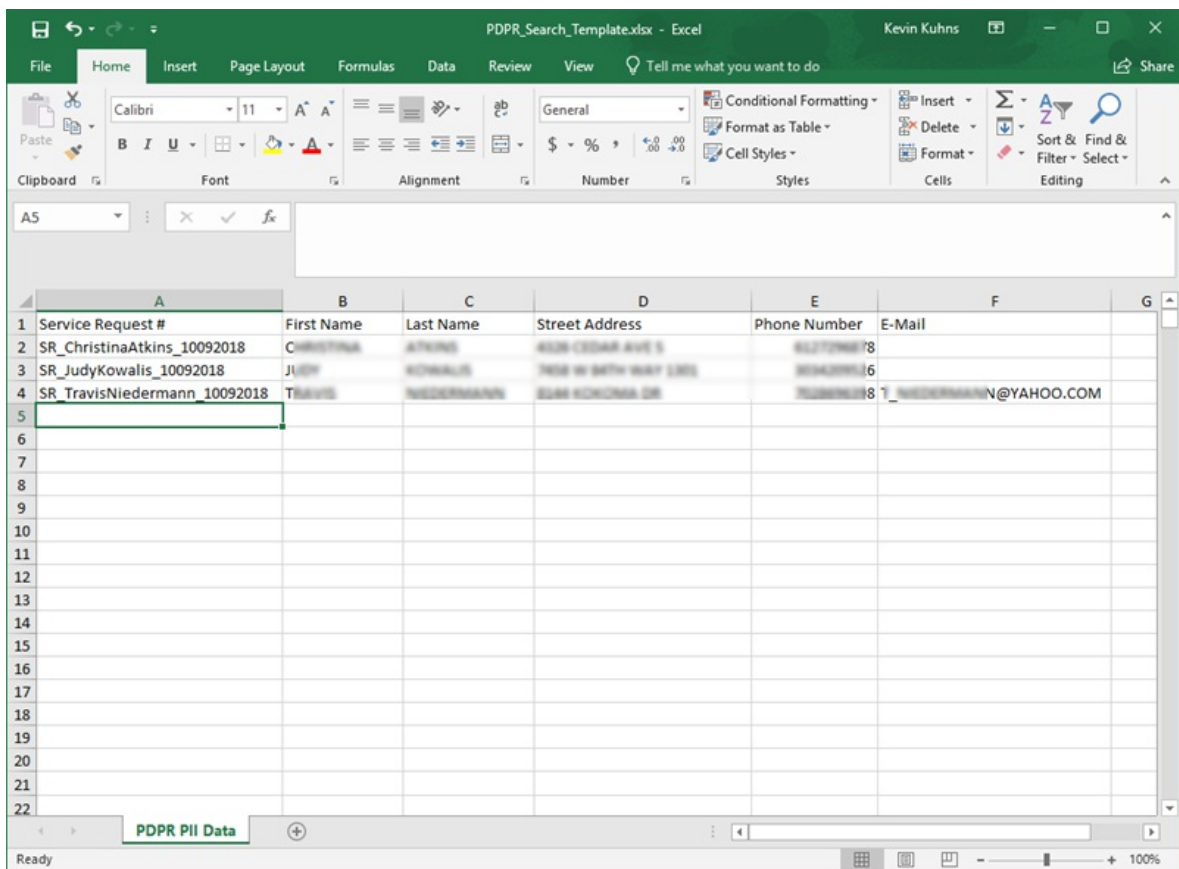
1. Click the **Download File Template...** button to download the built-in PDPR_Search_Template spreadsheet to the Downloads folder on the local computer.
2. Open the PDPR_Search_Template.xls file and add the PII data for multiple requests - one request per row. Note the following guidelines.

Click here to see guidelines for using the PDPR import template.

- If you have more than 25 rows of data in the spreadsheet, the PDPR tool displays a warning dialog, but it still loads the first 25 rows of data when you click **OK**.



- A larger number of rows of data in the spreadsheet may cause slow processing time on a large database.



- If you want to search for more than 25 rows of user data, first edit the PDPRTool.exe.config file and change the **MaximumRequestSearchCount** value to something greater (or less) than 25. Save the file and be sure to exit and restart the PDPR Tool before trying to upload the spreadsheet again.
 - You can import data to the spreadsheet, but it must match the columns in the PDPR_Search_Template file, and you must keep the column headings in the template. Enter all data exactly as it is in the database.
 - If any rows use the **First Name**, **Last Name**, or **Address Fields**, you must include data in at least one of the required related fields. For example, you can't use **Last Name** by itself as a search criteria - you must also include at least one other field. However, you can use **Phone Number** or **Email** fields as a single search criteria.
 - The **Service Request #** field is mandatory in the spreadsheet. It must have a value for each row.
3. When finished, click the **Upload Data File...** button to load the PII data for validation. If the data in the spreadsheet meets the expected form, you see a confirmation message. If the data in the spreadsheet is not valid (for example, missing column

headings or incomplete data), you see an error with an indication of what to fix.

4. Click the **Search** button to start the search. The search time for multiple records is longer than the search time for a single request.

The screenshot shows the PDPR Tool interface. At the top, there's a header bar with the title 'PDPR Tool'. Below it, the 'Search Criteria' section has two radio buttons: 'Single Request' (selected) and 'Multiple Requests'. There are buttons for 'Upload Data File....' and 'Download File Template....'. The 'Selected File Name' is 'C:\U3\VC\PDPRV1.16.4\Release\DataBaseQueries\PDPR_Search_Template.xlsx'. A 'Search in' dropdown is set to 'All', with 'Search' and 'Clear' buttons. To the right, the 'Login User Info' section shows 'Admin' as 'administrator' and 'IC Server' as 'Qf-richods', with a 'Logout' button. The 'Search Results' section lists various categories with their counts: 'Legacy Tracker Call Information:-' (Count: 0), 'Records not found for Legacy Tracker Call Information' (Count: 0), 'Modern Tracker Call Information:-' (Count: 0), 'Records not found for Modern Tracker Call Information (Interaction Summary)' (Count: 0), 'Records not found for Modern Tracker Call Information (Interaction Segment Detail)' (Count: 0), 'Fax Interaction Information:-' (Count: 0), 'Records not found for Fax Interaction Information' (Count: 0), 'Recorded Interaction Information:-' (Count: 0), 'Records not found for Recorded Interaction Information' (Count: 0), 'Recording Attribute Information:-' (Count: 0), 'Records not found for Recording Attribute Information (Custom Attribute)' (Count: 0), 'Scorecard Information:-' (Count: 0), 'Records not found for Scorecard Information' (Count: 0), 'Company Directory Information:-' (Count: 0), 'Records not found for Company Directory Information' (Count: 0), and 'Dialer Call History:-' (Count: 1657). Below the 'Dialer Call History' section, there are checkboxes for 'phonenumber', 'customdata1', and 'customdata2'. At the bottom, there are 'Generate Report' and 'Anonymize' buttons.

Generate a report

From the same screen with Search Results, click the **Generate Report** button to create a report and save it to a specified location. The report contains the PII data found in the selected tables. Once the data is anonymized, it will no longer be able to be selected and included in a report.

Note: Both the spreadsheet you create and the generated report contain PII data. It is your responsibility to protect that data and purge or delete these files, or to handle them appropriately, once the anonymization work is complete.

Select records and anonymize data

Select the record(s) that you want to obfuscate and click the **Anonymize** button. If you are confident to proceed with the change, click **Yes** on the confirmation dialog box. If this is a Single Request, you will have another opportunity to cancel the operation after you click **Yes**, when you enter the service request number. If this is a Multiple Requests operation and you added the service request number in the spreadsheet, you will **not** have another chance to cancel this operation. **Once the records are obfuscated, you cannot reverse it.**

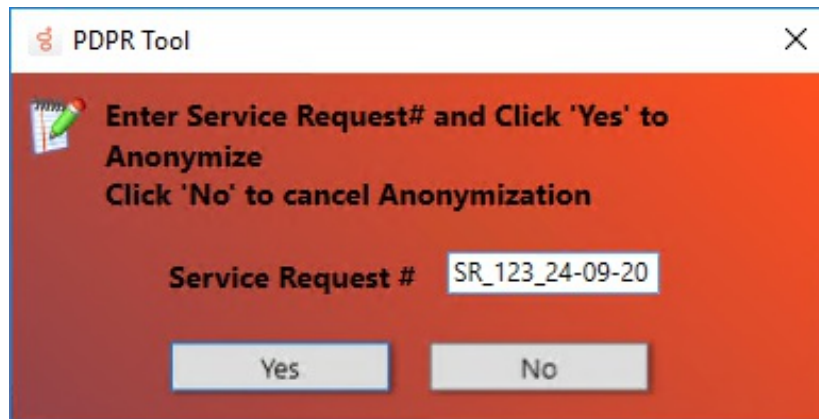
The screenshot shows a confirmation dialog box titled 'PDPR Tool - Anonymize Data Confirmation'. It has a yellow warning icon and the text: 'Are you sure you want to Anonymize selected data? Data will be permanently obfuscated.' Below this, there is a checkbox labeled 'Refresh search results after Anonymization' which is checked. At the bottom, there are 'Yes' and 'No' buttons.

Note: By default, the PDPR Tool refreshes the search results to show that the data no longer appears in the search, and this refresh can add time to the operation. Clear the **Refresh search results after Anonymization** check box to prevent the search refresh. You can change the default value for this check box by editing the PDPRMTool.exe.config file and changing the **RefreshGridPostAnonymization** parameter value from true to false. Restart the tool after updating the .config file to see the changes.

Enter a service request number

In the case of a Single Request, you must enter a service request number and click **Yes** to anonymize the selected data. Click **No** on the **Enter Service Request** dialog to cancel the anonymize operation.

The service request number entry is not validated, so it can contain any numbers or characters from your CRM system or other system used to track and audit GDPR compliance requests. PureConnect Cloud customers who open a Data Privacy support ticket will have that ticket number added as the Service Request number, which is stored with other related data in the [Audit Trail table](#) in the PureConnect database.



If you attempt to search again for the modified PII data, the PDPR Tool will not return any results.

Related Topics:

[Audit Trail Table](#)

PureConnect Data Privacy Request Tool

Genesys offers a database anonymization tool for download via the [PureConnect Utilities and Downloads](#) page on the PureConnect Product Information site. This tool is for any PureConnect customer that has access to their PureConnect database and who has Master Administrator and View User Queue access rights in Interaction Administrator.

- It queries the PureConnect database to return records with PII which you can then select to anonymize the PII data.
- It supports individual record search or multiple record search via an uploaded spreadsheet template.
- It generates and saves reports showing PII data to be anonymized.
- It anonymizes (rather than deletes) specified PII data to retain the integrity of report metrics and statistics. It does not delete records.
- It anonymizes personal data by replacing it with "XXXX". Once data is replaced, it cannot be recovered again.
- It creates an audit trail table in the PureConnect database, which includes a service request number associated with each anonymization operation.

Related tasks:

[Download and install the PureConnect Data Privacy Request Tool](#)

[Use the PureConnect Data Privacy Request Tool](#)

[Audit Trail Table](#)

Last updated: 25-Sept-2018

Audit Trail Table

When you enter a Service Request number in the PDPR tool and click **Yes** to anonymize data in the PDPR Tool, the tool creates a record in the PureConnect database to track the operation in the Audit Trail table. A DBA can query this table to generate audit trail reports.

The audit trail table contains these fields.

Column Name	Data Type (size)	Is Nullable	Description
GDPRAuditTrailID	Bigint	False	This column makes up the primary key for the table
SRNumber	Varchar	False	This is a service request number from the customers help desk ticketing system or other number as entered in the Service Request # dialog
RequesterName	Varchar	False	Logged in IC User Name
RequestedOnDate	Varchar	False	Date Time when information was anonymized
SearchCriteria	Varchar	False	Primary Keys and table names which were anonymized
IsDeleted	Tinyint	False	Not used; reserved for possible future use
IsAnonymized	Tinyint	False	Anonymize request

Related Topics

[PureConnect Data Privacy Request Tool](#)

[Use the PureConnect Data Privacy Request Tool](#)

Change Log

The following table lists the changes to this PureConnect Data Privacy Request Tool content since initial product availability.

Date	Changes
26-July-2018	Initial release of the PureConnect Data Privacy Request tool.
24-September-2018	- Added "Single Request" and "Multiple Request" feature documentation to the Use the PureConnect Data Privacy Request Tool topic for version 2.0.0 of the PDPR Tool. Updated related screen shots and content. - Added explanation of new "Refresh search results after anonymization" option.
18-January-2019	The "Dialer Call History" was changed to "Dialer History" in the Search In list, a new table was added for "Dialer Digital History" (to include email and other digital data in 2018 R5 and newer), and the IC Server version number was added to the name label.
13-February-2019	Added a Note about the "TrackerEnabled" variable in "Use the PureConnect Data Privacy Request Tool" topic.
31-July-2019	Added the requirement for Master Administrator and View User Queue access rights to log in and anonymize data. Also added mention of Analytics table support.