Genesys Info Mart Deployment Guide

Enabling Reporting on User Data

12/16/2025

Enabling Reporting on User Data

The following steps summarize the task flow to enable Genesys Info Mart to capture and store user data (interaction-based attached data or UserEvent-based data) that is attached to voice or multimedia interactions.

> ## Tip
>
> The Genesys Info Mart installation package (IP) includes the User Data Assistant, a tool to automate preparation of the user-data configuration files. The User Data Assistant is a Microsoft Excel file, **User_Data_Assistant.xlsm,** located in the **sql_scripts** folder in your Genesys Info Mart IP. The User Data Assistant requires Microsoft Excel 2007 or later, with macros enabled. Full instructions on using the tool are within the tool itself.
>
> The tool is intended to be used only for fresh deployments and not to modify existing user-data extension tables or an existing ICON attached-data specification file.

1. **Configure the ICON application to store user data.**
   When you prepare the ICON application, ensure that you set the following option values:

   - **role** includes the value gud

   - **adata-extensions-history** = none (for Voice details)

   - **adata-reasons-history** = none (for Voice details)

   - **adata-userdata-history** = none (for Voice or Multimedia details)

2. **Specify the user data that ICON will store in IDB.**

   a. Identify the key-value pairs (KVPs) from various applications that Genesys Info Mart requires for data processing. For more information about the KVPs that contact centers typically use for reporting purposes, see User Data Sources and KVPs.

   b. For call-based attached data, modify the ICON attached data specification file to capture the KVPs that you require and to control in which IDB table(s) ICON will store the data. By default, ICON expects that the name of the attached data specification is **ccon_adata_spec.xml.**

   Genesys Info Mart provides an example of a customized attached data specification. The sample specification file, **ccon_adata_spec_GIM_example.xml,** is included in the **sql_scripts** folder in your Genesys Info Mart IP. The sample is reproduced here. You can use the User Data Assistant to prepare the customized attached data specification file.

   For more information about how to customize the attached data specification file, see Customizing Attached Data Storage. See also the information about storing attached data in the *Interaction Concentrator Deployment Guide* for your release.

   c. For UserEvent-based user data, set ICON configuration options, as required, to store user data in the G_CUSTOM_DATA_S table in IDB. For more information, see Using UserEvent-Based KVP Data and Configuring UserEvent Data Storage.

   For more information about the required ICON configuration settings, see the descriptions of the options in the **[custom-states]** section in the *Interaction Concentrator Deployment Guide* for your release.

3. **Plan the Info Mart tables in which you want to store user data.**

   a. Identify the Info Mart fact or dimension tables in which you want user data to be stored. For more information, see Storing User Data.

      Some target tables and columns are predefined. You can also store user data in custom-defined tables and columns, which you create later when you modify and execute SQL scripts.

   b. Map the user-data KVPs to the Info Mart tables and columns that you have identified. Genesys provides a worksheet to assist you in completing the mapping. You can also use the User Data Assistant to map the KVPs.

      For more information about how to map attached data and specify the propagation rules, see User Data Mapping and Propagation Rules.

4. **Modify the Info Mart database schema, as required, to store custom user data.**

   a. Prepare the user-data SQL script to:

      - Specify creation of the target user-data fact and dimension tables and columns, in accordance with your mapping worksheet.

      - Map the user-data key names to the target tables and columns (in the CTL_UD_TO_UDE_MAPPING table), and the key names in the user-data dimension table(s) to the IRF_USER_DATA_KEYS table (in the CTL_UDE_KEYS_TO_DIM_MAPPING table).

      For information about manually preparing the script, see Preparing the User Data Script. Alternatively, you can use the User Data Assistant to generate the required script, based on the mapping you provide in the tool. Sample template scripts (**make_gim_UDE_template.sql** and **make_gim_UDE_template_partitioned.sql**) are available in the RDBMS-specific scripts folder in your Genesys Info Mart installation package.

   b. Execute the modified script when you create the rest of the Info Mart database schema, or when you complete the deployment after installing Genesys Info Mart.

   ## Important

   If you are modifying an existing Info Mart database schema, Genesys recommends that you back up the Info Mart database before you execute the script.

5. **(Optional) Enable storage of user data for interactions that are in mediation.**
   Configure the **link-msf-userdata** configuration option in the **[gim-etl]** section of ACD Queue and Virtual Queue DNs and Interaction Queue or Interaction Workbin Script objects or, starting with release 8.5.003, the link-msf-userdata-voice or link-msf-userdata-mm options on the Genesys Info Mart Application object. For more information, see Procedure: Configuring a DN for ICON and Genesys Info Mart reporting and Procedure: Setting Script object options for Genesys Info Mart reporting.

6. **(Optional) Enable Genesys Info Mart to extract KVPs that are sourced from the** Reasons **or** Extensions **attributes, in addition to the** UserData **attribute, in data-source events.**
   Turn off filtering of user data in IDB by setting the `filterUserData` startup parameter in the **gim_etl_server** file to `false`. For more information, see Modifying JVM Startup Parameters.

7. **(Optional) Streamline Genesys Info Mart processing of user data.**
   If your historical reporting involves the use of large quantities of user data, consider increasing the value of the ud-io-parallelism option, to enhance performance of the transformation job.