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User Data Management Administrator's Guide

5/16/2026

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User Data Management

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- 1 Accessing UDM
  - 1.1 Logging out

User Data Management (UDM) enables you to securely export and download your contact center data.

User Data Management (UDM) enables you to securely export and download your contact center data.

The exported data files are encrypted with your public encryption key and stored for 30 days, during which time you can download the files and decrypt them using your private encryption key.

After 30 days, the data files are deleted.

Accessing UDM

To log in to UDM, enter the **Tenant** name and your **Username**. You can also specify the tenant and user name in the `tenant\username` format.

If you want your details to be saved for the next time you log in, select **Remember me**.

Click **Next**.

Enter your **password** and click **Sign in**.

> ### Important
> If you don't have the permissions required to access UDM, you'll be taken to an **Access Denied** page. If you feel this is in error, ask your administrator to check your permissions.

Logging out

To log out, click your user name to open the drop-down and select **Log Out**.

Working with Jobs

Contents

- 1 Create a new job
- 2 Clone an existing job
- 3 Suspend (and resume) a job
- 4 Modify a job
- 5 Delete a job
- 6 View the history of a job

You can access the **Jobs** page to set up, modify, and monitor your data export jobs.

The **Jobs** page displays a list of your data export jobs. From here, you can create new jobs or monitor and manage existing ones.

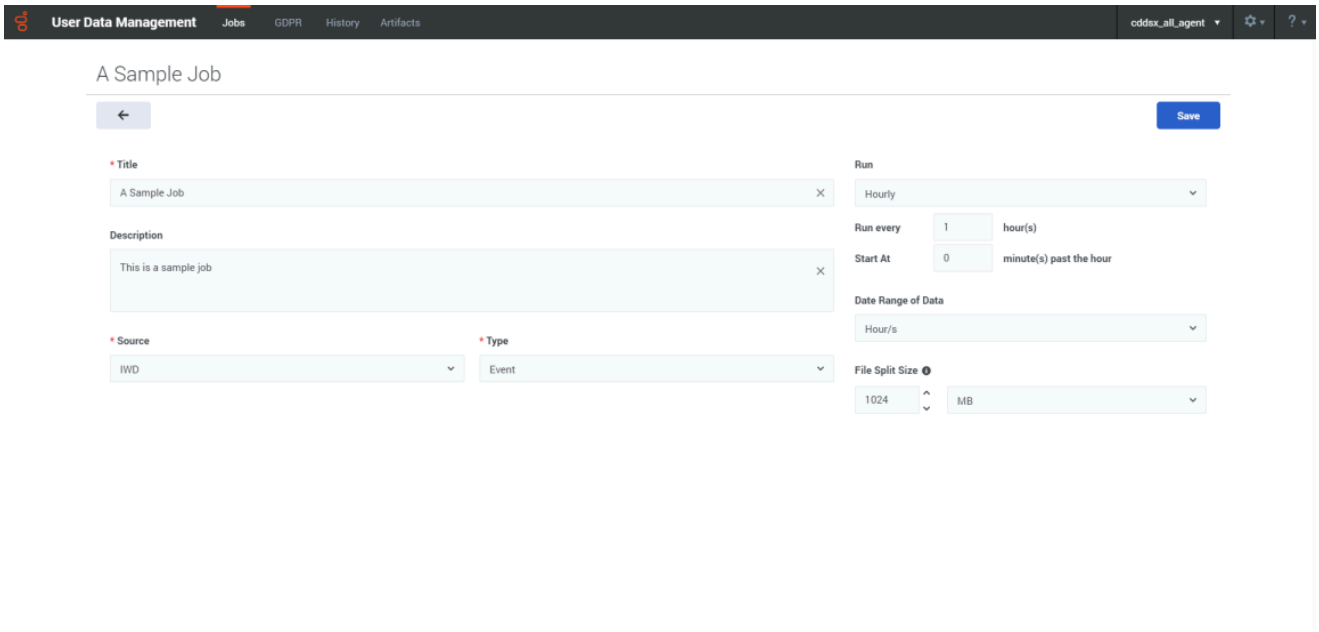
> **Tip**
> You can view full details for all active and completed jobs on the **History** page, which you can access from the **Export** menu.

The page provides details about each job, such as data source, job type, latest status, and date when each job last ran. If a job is still running, the **Latest Status** column features a status bar to indicate the progress of the active data export job. If you hover your mouse over the bar, it displays the estimated time remaining until the job completes.

Create a new job

To create a new job, click the **Add new job** button:

This opens the job settings editor, where you can specify the settings for the new job. Mandatory fields are marked with an asterisk (*).



You must give the job a **Title**. You can also add a **Description**, but this is optional.

Select **Contact History** as the data **Source**. Then you can choose either **Interaction** or **Contact** as the data **Type**.

By default, **Entity Types** is enabled for **all**. If you turn the slider off, you must select at least one entity type (for example, **Work Item**). You can add multiple entity types.

Use the **Run** setting to specify how often to run the job. You can then choose to run the job immediately or schedule it to start at a specific date and time.

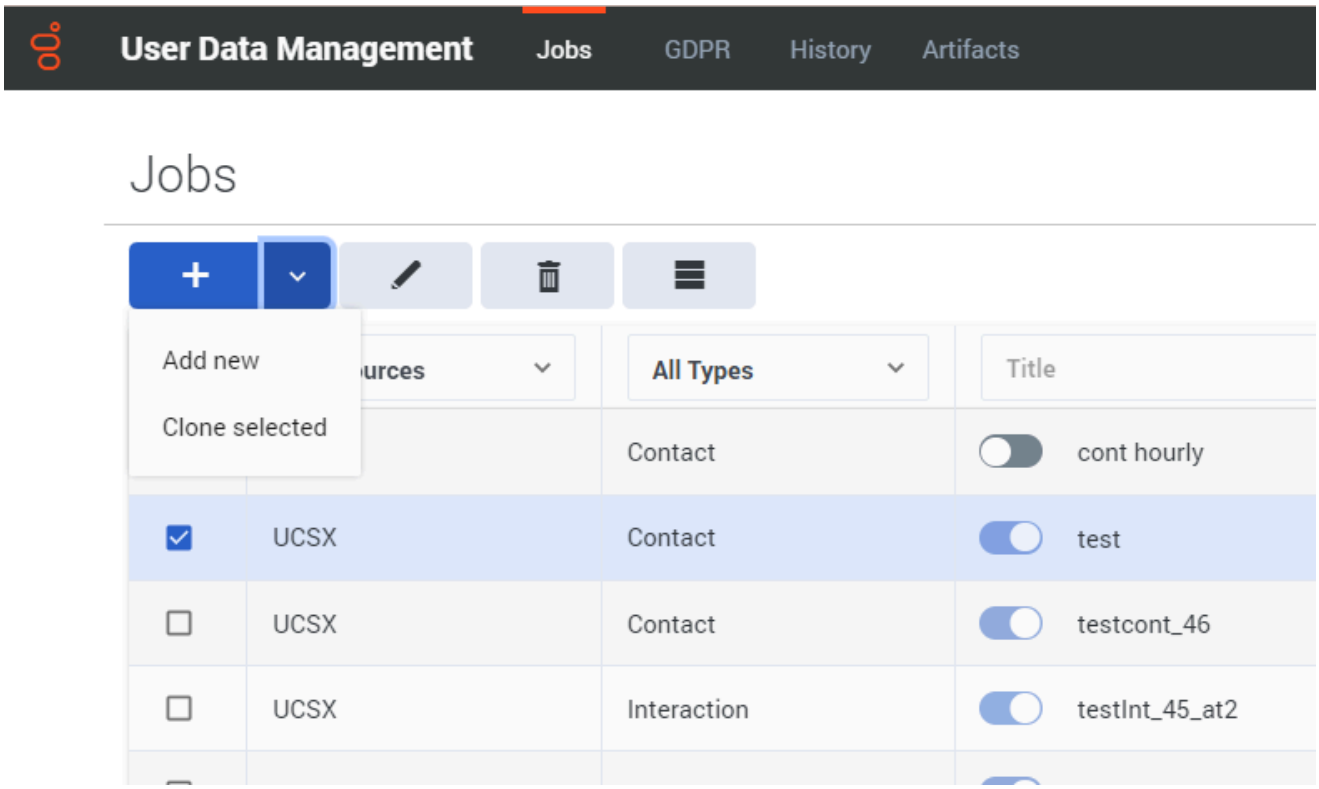
- **Once** - Select if this job is an one-time job that starts immediately after creation when **Start immediately** is selected or at a specific future date and time when **Configure start date and time** is selected.
- **Hourly** - Select if the job is to be run every hour. The valid hours can be between 1 and 23 and the minutes can be between 0 and 59.
- **Daily** - Select if the job is to be run every day at a specified time.
- **Weekly** - Select if the job is to be rum once a week at the specified day and time.
- **Monthly** - Select if the job is to be run once a month at the specified day and time. **Note**: This job will be not be run in months with 30 days or less if you select *30* in the **Day of month** option.

The **Date Range of Data** setting lets you export all data or just the data for a specific time period. If you select **Fixed interval**, you can then specify the **Start** and **End** dates for the export.

By default, the data is exported as a single file. If you want to break the exported data into a set of smaller files, use the **File Split Size** setting to specify the size of each file.

When you are finished setting up the job, click **Save**.

Clone an existing job



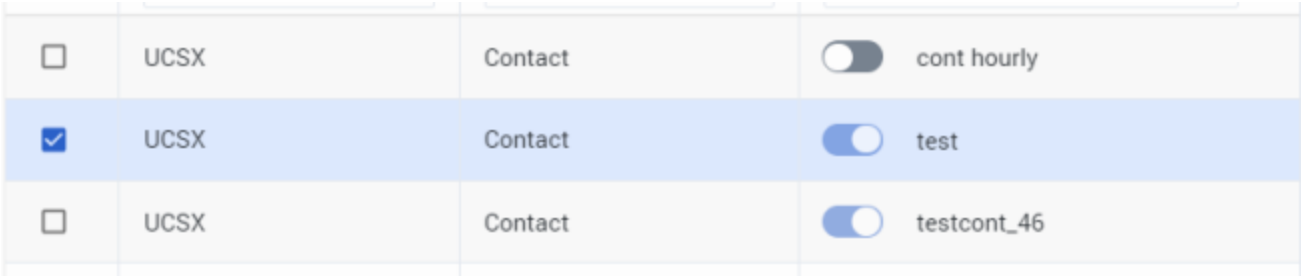
This option is useful if you want to create a new job based on the settings of an existing job.

Select the job you want to clone and choose **Clone selected** from the **Add new** button dropdown menu:

This opens the job settings editor. You can keep the existing job settings, or make any desired changes. For example, you might want to give the job a different **Title** or adjust the range of the **Export Start/End** dates.

When you are finished, click **Save**.

Suspend (and resume) a job



Use the slider to change the state of a job to **Suspended** or **Active**.

> **Important**
> If you create a one-time data export job (i.e., a job you intend to only run once) and submit it to run immediately, it is automatically added in a suspended state and can't be resumed. If you create and submit a one-time job with a delayed (i.e. scheduled) start time, it automatically changes to a suspended state when the job starts.

Modify a job

Select the job you want to edit and click the pencil icon .

When you are finished making changes, click **Save**.

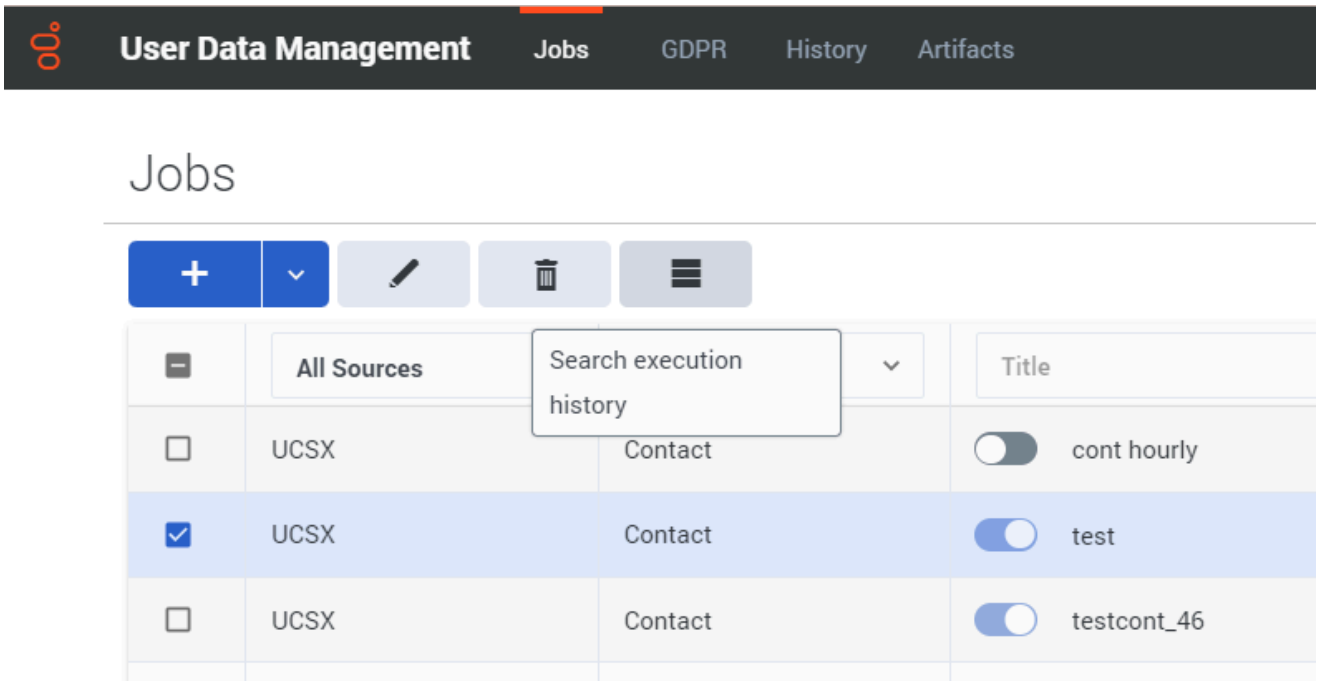
> **Important**
> If the data export job is only going to be run once, you cannot edit it after it is submitted. But you can modify the job before it is run.

Delete a job

Select the job you want to delete and click the trash icon .

> **Important**
> You can't delete a job that is still in progress.

View the history of a job



If you select a job and click the collapsed (or "hamburger") button, it will take you to the History page, where the results will be filtered to show the history of the selected job.

Exporting Data Files

Contents

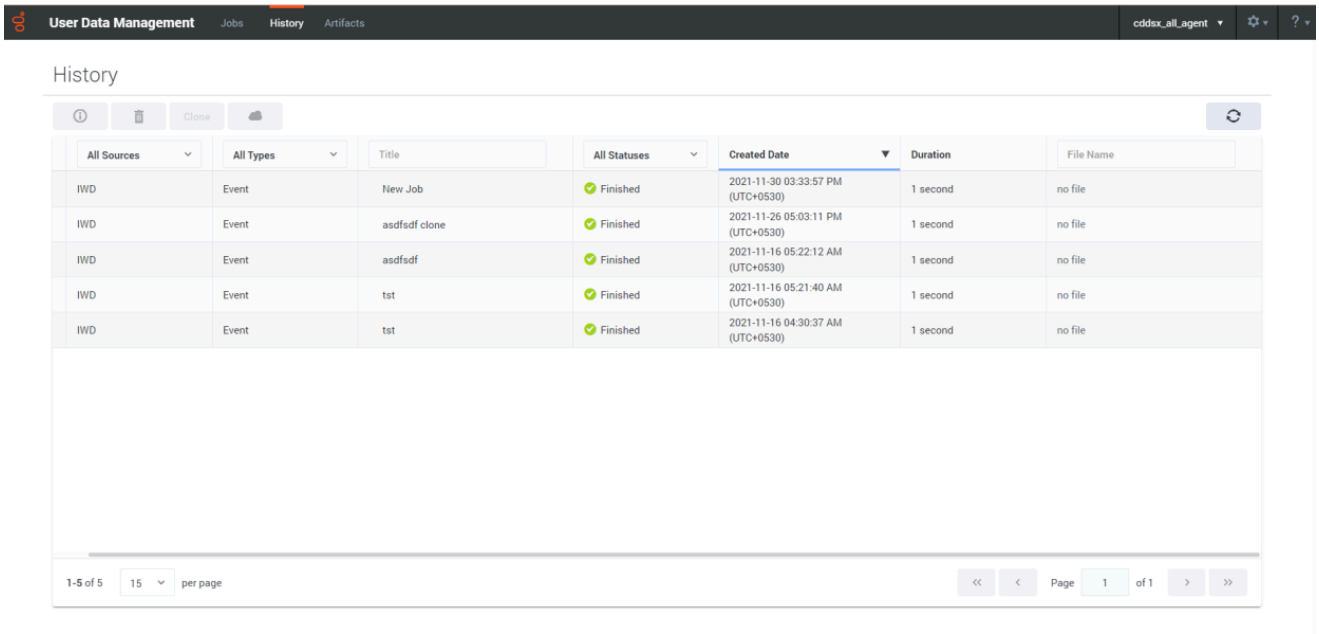
- 1 View the history for a job
- 2 View artifacts and download them
- 3 Download split files
- 4 Decrypt downloaded data files

From the **Export** menu, you can review and access your exported data files.

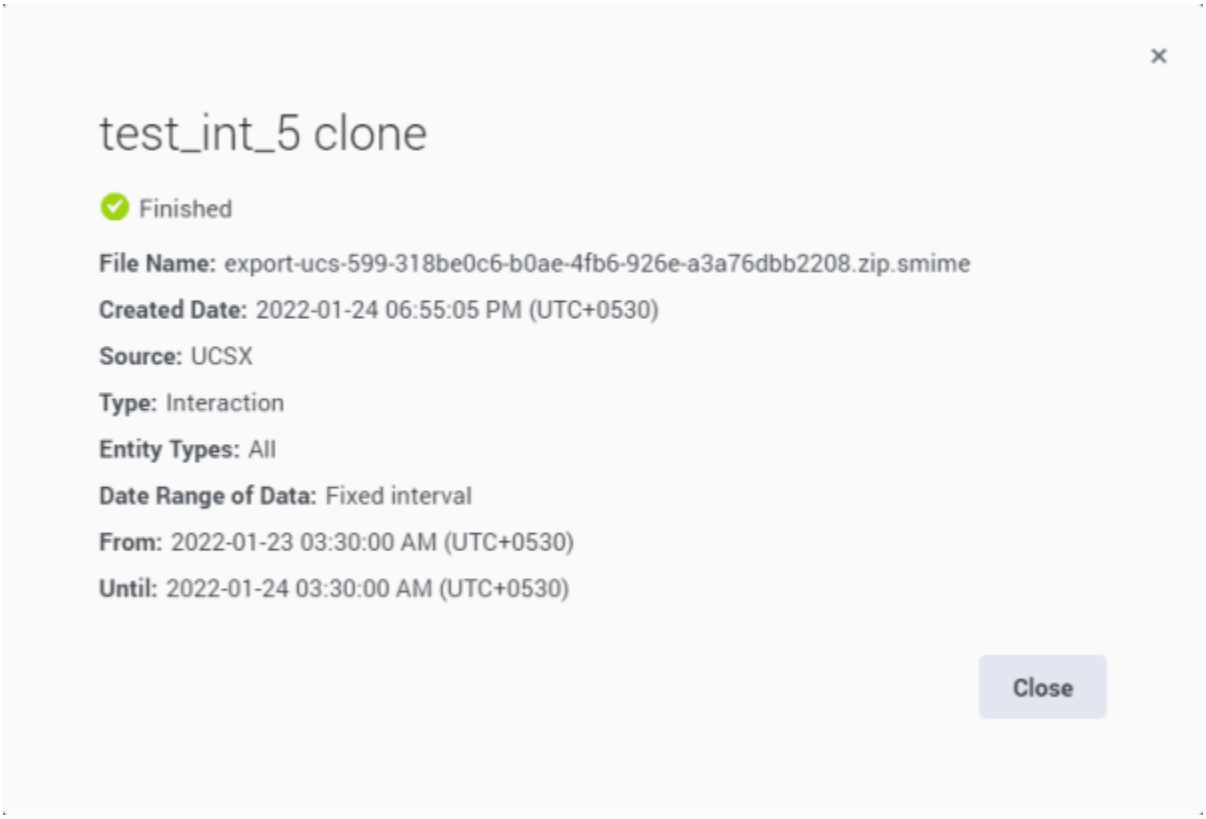
The **History** page shows a list of active and completed export jobs, with details such as the data source, job type, the current status of the job, when the job started, and the resulting file name. You can use the column headers to select, sort, or filter the files in the list.

For jobs with a status of **In Progress**, a progress bar indicates that the data export is currently active. If you hover your mouse over the bar, it will show you the estimated remaining time for the job to complete.

From this page, you can select a job and use the buttons to view additional details about the job, delete the job, clone that particular instance of the job, or locate the related file(s) on the *Artifacts*' page.



View the history for a job



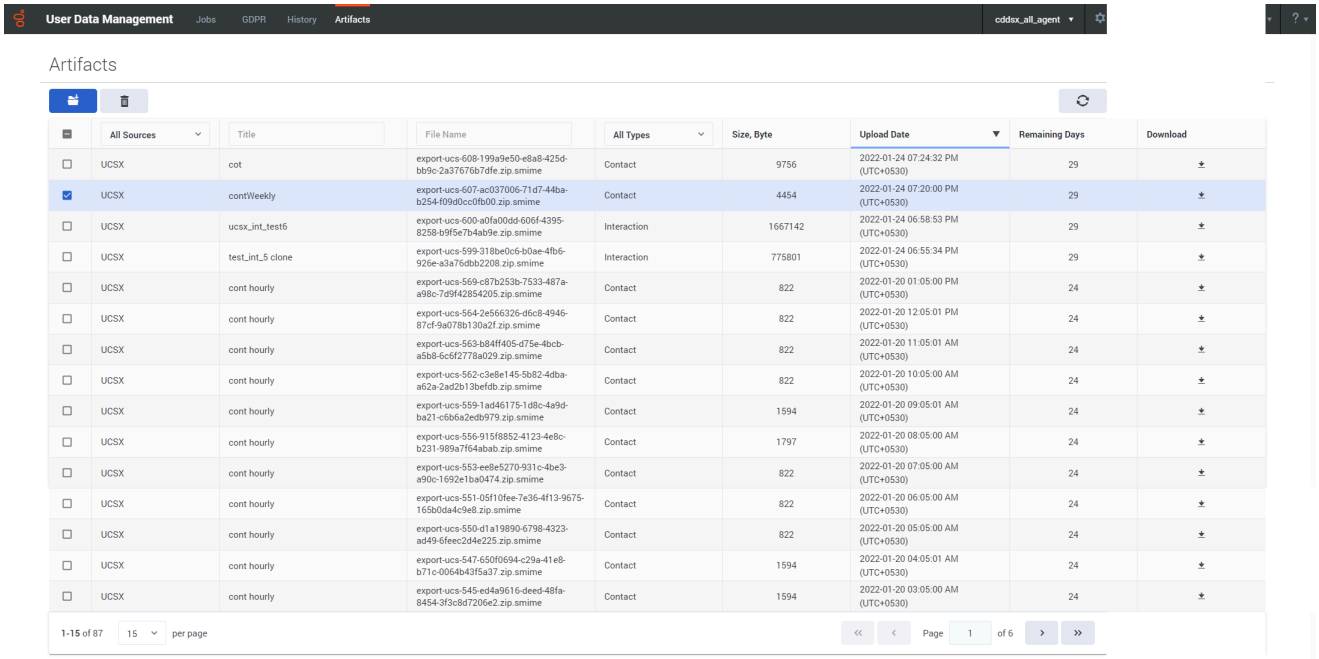
Select a job and click the info button to display detailed information about the job.

View artifacts and download them

The **Artifacts** page shows the exported data files that are available for download. You can see additional details about each file, such as the data type, when it was created, and how many days are remaining in the 30-day storage limit. You can use the column headers to select, sort, or filter the files in the list.

From this page, you can select a file(s) and then use the buttons to **download** or **delete** the selected file(s). You can select up to a maximum of 100 files, but note that each download opens in a separate browser window. Depending on your browser settings, you might need to disable any pop-up blockers.

Alternatively, you can also download a single file by clicking its download icon ( ). This sends the file directly to your specified download location.



> **Important**
>
> Files are stored for a maximum of 30 days. When the **Remaining Days** value reaches zero (0), the file is removed from storage and no longer available for download.

Download split files

If a job was set up using the **File Split Size** option, you must download all of the files associated with that job before extracting the data.

You can tell if a file belongs to a split job by the filename — it will indicate that the file is part of a numbered set. For example, **export-2b710a2c-0e7f-4918-983c-c02d108eaeb0.z12.smime** indicates that this file is part 12 of a compressed data file.

When you have downloaded all of the split files for a job, you just need to initiate the extraction for one of the files. The extraction utility will automatically locate and extract the other pieces that belong to the data file.

Decrypt downloaded data files

To obtain exported data files, you must have a valid encryption certificate. During the generation of data files, the original files are zip-compressed and packaged in an S/MIME message with an

enveloped-data content type that is encrypted using the public key of the certificate you provided. Once you download the data files, you can decrypt them by using the private key associated with the certificate.

You can use OpenSSL to decrypt your data export files. You can download the software by following the instructions here. If you are working with Windows, the OpenSSL binaries can be downloaded here.

To decrypt a downloaded data file, use the following OpenSSL command:

```
openssl smime -decrypt -binary -inkey .key -in .zip.smime -out .zip
```

where:

is the file to be decrypted

is the private key you used to initially configure file encryption, so that the exported files can be decrypted

is the file that would be written after decryption

After the file is decrypted, you can extract the contents of the zip file. Typically, the extracted files and folders are arranged in a hierarchical structure.

For more information about the formats and schemas used for data export files, see the Contact History Export Reference page.

If you want to decrypt your data files using a Java program, you can leverage code from this repository.

Contact History Export Reference

Contents

- 1 Interactions
  - 1.1 .json format
  - 1.2 -Attachment.json format
  - 1.3 List of available mimetypes
- 2 Contacts

This page contains information about how the data files for Contact History export jobs are formatted and structured.

The exported data files are formatted in JSON (JavaScript Object Notation) Lines format. In this type of format, each line in the file corresponds to one interaction or contact attribute, represented as a JSON object with keys and values.

For example, an entry in a contact export might look like this:


```
{"ContactId":"00001a57JGQ00A8TZSA","tenantid":101,"createddate":"2015-08-05 08:31:20.78"}
```


The way that the data fields and values are organized in each export file is controlled by a *schema*. The schemas used by UDM are based on **JSON Schema** (draft 7). You can learn more about JSON Schema by visiting their website.

The following sections provide the schemas used for each type of export job and include some examples of exported data.

> **Important**
>
> The examples provided for each export file have been formatted for easier viewing. In an actual export file, the data is displayed as a single-line, with each key-value pair separated by a comma.

Interactions

The Interactions export zip file includes separate JSON files for each interaction selected. If there are attachments available, they are also included as separate JSON files.

.json format

```
{
    "ixnId"
    "status"
    "entityTypeId"
    "mediaTypeId"
    "typeId"
    "subtypeId"
    "externalId"
    "ownerId"
    "contactId"
    "parentId"
    "startDate"
    "modifiedDate"
    "endDate"
```

```
"threadId"
"categoryId"
"timeShift"
"subject"
"text"
"structuredText"
"structTextMimetype"
"theComment"
"tenantId"
"subtenantId"
"threadHash"
"canBeParent"
"creatorAppId"
"queueName"
"allAttributes"
"isSpam"
"webSafeEmailStatus"
"isCategoryApproved"
"stoppedReason"
"lang"
"fromAddress"
"fromPersonal"
"replyToAddress"
"toAddresses"
"ccAddresses"
"bccAddresses"
"sentDate"
"mailbox"
"whichRuleMatched"
"emailOutId"
"header"
"fromAddressEmailOut"
"fromPersonalEmailOut"
"replyToAddressEmailOut"
"toAddressesEmailOut"
"ccAddressesEmailOut"
"bccAddressesEmailOut"
"sentDateEmailOut"
"forward"
"referenceId"
"reviewerId"
"standardResponseId"
"establishedDate"
"releasedDate"
"duration"
"outcome"
"phoneNumber"
"tConnectionId"
"callbackStatus"
"detailedDescription"
"customData"
"desiredResponseType"
"startTime"
"endTime"
"customerNumber"
"attempts"
"dn"
"location"
"callbackServerId"
"callResult"
"theType"
"mimeType"
"theSize"
```

```
    "content"
    "subscriberId"
}
```

-Attachment.json format

```
{
    "id"
    "mimeType"
    "theName"
    "description"
    "theSize"
    "documentId"
    "entityID"
    "entityTypeId"
    "content"
}
```

List of available mimetypes

- "image",
- "audio",
- "video",
- "text/plain",
- "text/html",
- "text/json",
- "text/csv",
- "application/pdf",
- "application/msword",
- "application/vnd.ms-powerpoint",
- "application/vnd.ms-excel",
- "application/vnd.ms-powerpoint",
- "application/vnd.ms-asf",
- "application/vnd.oasis.opendocument.text",
- "application/vnd.openxmlformats-officedocument.presentationml.presentation",
- "application/vnd.openxmlformats-officedocument.presentationml.slideshow",
- "application/vnd.openxmlformats-officedocument.spreadsheetml.sheet",
- "application/vnd.openxmlformats-officedocument.wordprocessingml.document",
- "application/json",
- "application/zip",
- "application/octet-stream",

- "application/x-cfb",
- "message/rfc822"

Contacts

The Contacts export zip file includes two separate JSON files. The **contact-...json** file includes a list of contacts where each item is of the format:

```
{
    "contactId"
    "tenantId"
    "createdDate"
    "modifiedDate"
    "mergeId"
}
```

The **contact-attributes-...json** files includes a list of contact attributes where each item contains:

```
{
    "id"
    "contactId"
    "attributeId"
    "attributeName"
    "mimeType"
    "description"
    "isPrimary"
    "tenantId"
    "strValue"
    "strValueLowercase"
}
```

Certificates Management

Contents

- 1 Requirements
  - 1.1 General Data Protection Regulation (GDPR) compliance
- 2 Importing an encryption certificate

Learn how to set up certificates to use UDM.

Requirements

UDM requires public/private keys for the encryption and decryption of data files and a valid X.509 RSA-compliant certificate in PEM format. Before you can export data, you must have a valid encryption certificate specified in your user preferences.

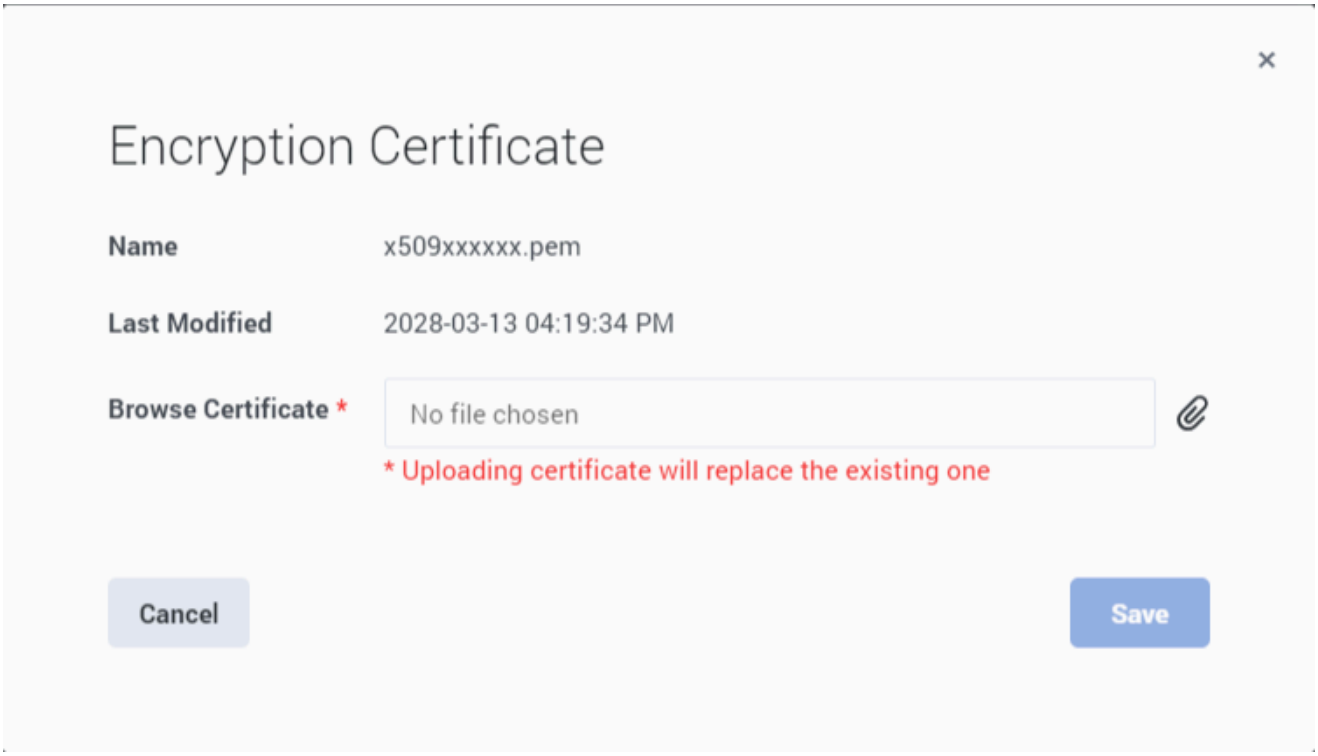
For an example of how to generate a self-signed certificate you can use with UDM, see Certificate Requirements. You can then import the certificate into UDM.

General Data Protection Regulation (GDPR) compliance

In general, Genesys support for GDPR compliance is based on default configuration settings and typical application usage. User Data Management, like other underlying components within Genesys Multicloud CX, does not store sensitive information beyond 30 days. Users who download their data using this tool are responsible for GDPR compliance in regards to any data that they have downloaded.

For more information, see Genesys Multicloud CX Support for GDPR.

Importing an encryption certificate



Before you can export data, a valid encryption certificate must be specified in your user preferences.

To add (or change) your encryption certificate, click on **Settings** (the gear icon) and select **Encryption Certificate**.

In the **Browse** field, choose the certificate file you want to use and save your changes.

> **Important**
> When you upload a certificate, it replaces the current certificate.

Access Management

Contents

- 1 Configure Role-Based Access Control
  - 1.1 Working with UCS UCSX Exporter role
  - 1.2 Working with iWD Administrator role

Learn about the roles required for exporting data using UDM.

Configure Role-Based Access Control

There are two roles available in UDM: **UDM UCSX Exporter** and **iWD Administrator**. Both these roles have access to export data. If users do not have any of these two roles, the **Jobs**, **History**, and **Artifacts** tabs are disabled and hidden.

Working with UCS UCSX Exporter role

Agents with the **UDM UCSX Exporter** role can create jobs to export UCSX data: Interactions or Contacts. For these agents, the **History** page and the **Artifacts** page will display only *Interaction* or *Contact* items that have *UCSX* as the source. They can export all interactions or a specific **Entity Type**.

Working with iWD Administrator role

Agents with the **iWD Administrator** role can create jobs to export iWD data: Events. For these agents, the **History** page and the **Artifacts** page will display only *Events* items that have *iWD* as the source.

Agents with both roles can create jobs to export USCX or iWD data.