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# CX Contact Deployment Guide

Integrating CX Contact with Genesys Historical Reporting

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# Integrating CX Contact with Genesys Historical Reporting

This page describes the component and configuration requirements to enable historical reporting on unattempted records.

## Overview: Historical Reporting on Unattempted Records

While Outbound Contact Server (OCS) reports on the outcome of all attempted records and records failed pre-dial validation checks, it does not report on records belonging to a contact suppression list for the campaign group. This comes from CX Contact. The process is as follows:

1. When the campaign group is activated, CX Contact writes all information related to unattempted records to an Elasticsearch index (it writes one Elasticsearch document for each suppressed record).
2. As part of the regular ETL cycle, Genesys Info Mart extracts the data from Elasticsearch and transforms it into Genesys Info Mart **LDR\_\*** tables, which you can join with OCS-sourced data on that campaign group's attempted records.

For more information about the Genesys Info Mart database tables, see the [Genesys Info Mart Physical Data Model](#) for your RDBMS. For more information about managing the Genesys Info Mart ETL jobs, see the [Genesys Info Mart Operations Guide](#).

## Defining Unattempted Records

In this context, an unattempted record refers to a record belonging to a contact suppression list. Records excluded from a campaign because of defined filtering criteria or compliance rules are not considered unattempted records in this context.

The following table summarizes the ways in which records are reported on:

| Record Type                                                           | Reporting Source                               |
|-----------------------------------------------------------------------|------------------------------------------------|
| Dialed/attempted records                                              | OCS > ICON > Genesys Info Mart                 |
| Records belonging to a contact suppression list (unattempted records) | CX Contact > Elasticsearch > Genesys Info Mart |
| Records that failed pre-dial validation checks (unattempted records)  | OCS > ICON > Genesys Info Mart                 |

## Enabling Historical Reporting on Unattempted Records

### Prerequisites

The following table summarizes the minimum release requirements for the Genesys and third-party components that enable CX Contact historical reporting.

| Component         | Minimum release                                                                               |
|-------------------|-----------------------------------------------------------------------------------------------|
| CX Contact        | 9.0.000.09                                                                                    |
| Elasticsearch     | 6.3.1                                                                                         |
| Genesys Info Mart | 8.5.012.15                                                                                    |
| ICON              | 8.1.514.11 (Recommended minimum for Genesys Info Mart; Required for OCS historical reporting) |

### Setting up Historical Reporting

To set up historical reporting of unattempted records:

1. Deploy [Elasticsearch](#) version 6.3.1. Once this is successfully deployed, CX Contact can write all required indexes to Elasticsearch. No explicit CX Contact configuration is required.

#### Important

There are index properties that contain personally identifiable information (PII) and therefore need to be considered for the EU General Data Protection Regulation (GDPR). Ensure you configure the Elasticsearch data-retention settings so that indexes are purged before 30 days.

2. Configure Genesys Info Mart to extract the CX Contact reporting data from Elasticsearch, as follows:
  1. On the **Options** tab of the Genesys Info Mart application object, create a new configuration section, called **elasticsearch-ldr0**.
  2. Add the client option. For example: **elasticsearch-ldr0/client=rest(host.domain.com)**
  3. Add the g:tenant-prefix option. For example: **elasticsearch-ldr0/g:tenant-prefix=-2115**

#### Important

Genesys expects that CX Contact reporting on unattempted records will be used to supplement existing Outbound Contact reporting sourced from OCS. Ensure that your deployment has been configured as required for Genesys Info Mart to support Outbound Contact reporting. For more information, see [Enabling Reporting on Outbound Contact Activity](#) in the *Genesys Info Mart Deployment Guide*.

## Elasticsearch Index Properties

The following table describes the Elasticsearch index properties, in which CX Contact stores the data about unattempted records. Note the following:

- The **Index property** column represents the XPath term Genesys Info Mart uses to extract and map the data.
- The **Info Mart Database Target** column indicates the Info Mart database table and column to which the property is mapped.

| Index property       | Description                                                                                                                                                                                                                                                                                                                                                      | Info Mart Database Target                                                             |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| campaignGroupId      | The DBID of the campaign group as assigned by Configuration Server.                                                                                                                                                                                                                                                                                              | LDR_CAMPAIGN.CAMPAIGN_GROUP_ID<br>(referenced through LDR_FACT.LDR_CAMPAIGN_KEY)      |
| campaignGroupName    | The name of the campaign group.                                                                                                                                                                                                                                                                                                                                  | LDR_CAMPAIGN.CAMPAIGN_GROUP_NAME<br>(referenced through LDR_FACT.LDR_CAMPAIGN_KEY)    |
| campaignTemplateName | The name of the campaign template on which the campaign group is based.                                                                                                                                                                                                                                                                                          | LDR_CAMPAIGN.CAMPAIGN_TEMPLATE_NAME<br>(referenced through LDR_FACT.LDR_CAMPAIGN_KEY) |
| chainId              | The chain identifier of the record from the contact list.                                                                                                                                                                                                                                                                                                        | LDR_FACT.CHAIN_ID                                                                     |
| chainN               | The order of the contact list record within the chain.                                                                                                                                                                                                                                                                                                           | LDR_FACT.CHAIN_NUMBER                                                                 |
| clientId             | The unique client identifier of the contact from the contact list.                                                                                                                                                                                                                                                                                               | LDR_FACT.CLIENT_ID                                                                    |
| contact_info         | The contact information (device) for the contact from the contact list.                                                                                                                                                                                                                                                                                          | LDR_FACT.CONTACT_INFO                                                                 |
| contact_info_type    | <p>The type of the contact device. This field is set to one of the following values:</p> <p><b>Valid values:</b></p> <ul style="list-style-type: none"> <li>• No Contact Type</li> <li>• Home Phone</li> <li>• Direct Business Phone</li> <li>• Business With Extension</li> <li>• Mobile</li> <li>• Vacation Phone</li> <li>• Pager</li> <li>• Modem</li> </ul> | LDR_RECORD.CONTACT_INFO_TYPE<br>(referenced through LDR_FACT.LDR_RECORD_KEY)          |
| Index property       | Description                                                                                                                                                                                                                                                                                                                                                      | Info Mart Database Target                                                             |

| Index property    | Description                                                                                                                        | Info Mart Database Target                                                     |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"> <li>Voice Mail</li> <li>Pin Pager</li> <li>E-Mail Address</li> <li>Instant Messaging</li> </ul> |                                                                               |
| deviceAreaCode    | The area code of the record from the contact list.                                                                                 | LDR_DEVICE.DEVICE_AREA_CODE (referenced through LDR_FACT.LDR_DEVICE_KEY)      |
| deviceCountryCode | The country code of the record from the contact list.                                                                              | LDR_DEVICE.DEVICE_COUNTRY_CODE (referenced through LDR_FACT.LDR_DEVICE_KEY)   |
| deviceMask        | The bit mask of the record from the contact list.                                                                                  | LDR_FACT.DEVICE_MASK                                                          |
| deviceStateCode   | The state code (or country code) of the record from the contact list.                                                              | LDR_DEVICE.DEVICE_STATE_CODE (referenced through LDR_FACT.LDR_DEVICE_KEY)     |
| deviceTimezone    | The time zone indicated in the record from the contact list.                                                                       | LDR_DEVICE.DEVICE_TIMEZONE (referenced through LDR_FACT.LDR_DEVICE_KEY)       |
| disposition       | The reason for filtering out the record from the campaign during the pre-loading phase, as reported by CX Contact.                 | LDR_RECORD.DISPOSITION (referenced through LDR_FACT.LDR_RECORD_KEY)           |
| groupName         | The name of the agent group or place group.                                                                                        | LDR_GROUP.GROUP_NAME (referenced through LDR_FACT.LDR_GROUP_KEY)              |
| id                | An identifier Genesys Info Mart generates based on the long UUID timestamp reported by CX Contact.                                 | LDR_FACT.ID                                                                   |
| listId            | DBID of the contact list as assigned by Configuration Server.                                                                      | LDR_LIST.LIST_ID (referenced through LDR_FACT.LDR_LIST_KEY)                   |
| listName          | The name of the contact list.                                                                                                      | LDR_LIST.LIST_NAME (referenced through LDR_FACT.LDR_LIST_KEY)                 |
| postalCode        | The postal code of the record from the contact list.                                                                               | LDR_POSTAL_CODE.POSTAL_CODE (referenced through LDR_FACT.LDR_POSTAL_CODE_KEY) |
| recordId          | The identifier of the record from the contact list.                                                                                | LDR_FACT.RECORD_ID                                                            |
| recordStatus      | The status of the record from the contact list. This field is set to one of the following values:<br><b>Valid values:</b>          | LDR_RECORD.RECORD_STATUS (referenced through LDR_FACT.LDR_RECORD_KEY)         |
| Index property    | Description                                                                                                                        | Info Mart Database Target                                                     |

| Index property    | Description                                                                                                                                                                                                                                                                                                                                                                                            | Info Mart Database Target                                                 |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"> <li>• No Record Status</li> <li>• Ready</li> <li>• Retrieved</li> <li>• Updated</li> <li>• Stale</li> <li>• Cancelled</li> <li>• Agent Error</li> <li>• Chain Updated</li> <li>• Missed Callback</li> <li>• Chain Ready</li> </ul>                                                                                                                                  |                                                                           |
| recordType        | <p>The type of the record from the contact list. This field is set to one of the following values:<br/> <b>Valid values:</b></p> <ul style="list-style-type: none"> <li>• No Record Status</li> <li>• Ready</li> <li>• Retrieved</li> <li>• Updated</li> <li>• Stale</li> <li>• Cancelled</li> <li>• Agent Error</li> <li>• Chain Updated</li> <li>• Missed Callback</li> <li>• Chain Ready</li> </ul> | LDR_RECORD.RECORD_TYPE<br>(referenced through<br>LDR_FACT.LDR_RECORD_KEY) |
| timestamp_iso8601 | The timestamp when the event regarding the suppressed contact list records was generated by CX Contact.                                                                                                                                                                                                                                                                                                | LDR_FACT.START_DATE_TIME_KEY                                              |
| Index property    | Description                                                                                                                                                                                                                                                                                                                                                                                            | Info Mart Database Target                                                 |

## Elasticsearch Index Fields

The following seven sections describe the seven types of Elasticsearch index fields. Each record

represents the Elasticsearch data shown in the corresponding CX Contact Analytics Reporting panel.

|                                                                                   |                             |
|-----------------------------------------------------------------------------------|-----------------------------|
|  | Job Record                  |
|  | Call List Loading Record    |
|  | Preloading Record           |
|  | Campaign Group Event Record |
|  | Call Result Record          |
|  | Contact History Record      |
|  | SMS/EMAIL Record            |
|  | User Actions Record         |

### Job Record (cxc-job-\*)

| Field      | Type    |
|------------|---------|
| id         | keyword |
| parentid   | keyword |
| @timestamp | date    |
| @endtime   | date    |
| ccid       | keyword |
| type       | keyword |
| name       | keyword |
| state      | keyword |
| result     | keyword |
| created    | date    |
| started    | date    |
| finished   | date    |
| duration   | integer |
| error      | text    |
| errorCode  | integer |
| trace      | keyword |
| component  | keyword |

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| Field    | Type    |
|----------|---------|
| version  | keyword |
| hostname | keyword |
| address  | keyword |



## Call List Loading Record (cxc-didr-\*)

| Field            | Type    |
|------------------|---------|
| id               | keyword |
| @timestamp       | date    |
| type             | keyword |
| jobid            | keyword |
| jobts            | date    |
| importfile       | keyword |
| line             | integer |
| mappingfile      | keyword |
| ccid             | keyword |
| listid           | integer |
| listTableName    | keyword |
| listName         | keyword |
| customTZMap      | boolean |
| chain_id         | integer |
| chain_n          | integer |
| contact_info     | keyword |
| deviceDigits     | text    |
| defaultRegion    | keyword |
| deviceIndex      | short   |
| accepted         | byte    |
| error            | keyword |
| e164             | keyword |
| countryCode      | keyword |
| areaCode         | keyword |
| exchange         | keyword |
| restOfNumber     | keyword |
| maskValue        | long    |
| tzuid            | integer |
| state_code       | keyword |
| country_code_iso | keyword |

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| Field | Type   |
|-------|--------|
| mask  | object |



## Preloading Record (cxc-contact-\*)

| Field                | Type    |
|----------------------|---------|
| id                   | keyword |
| @timestamp           | date    |
| ccid                 | keyword |
| calluuid             | keyword |
| contact_info         | keyword |
| contact_info_type    | keyword |
| contact_id           | keyword |
| chain_id             | integer |
| chain_n              | integer |
| callTime             | date    |
| callResult           | keyword |
| dialingMode          | keyword |
| optimizationGoal     | integer |
| optimizationMethod   | keyword |
| listName             | keyword |
| listid               | integer |
| campaignName         | keyword |
| campaignGroupName    | keyword |
| sessionuuid          | keyword |
| campaignTemplateName | keyword |
| groupName            | keyword |
| agentLoginId         | keyword |
| disposition          | keyword |
| successful           | boolean |
| userData             | object  |



## Campaign Group Event Record (cxc-cgevent-\*)

| Field      | Type    |
|------------|---------|
| id         | keyword |
| @timestamp | date    |
| ccid       | keyword |

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| Field                 | Type    |
|-----------------------|---------|
| sessionuuid           | keyword |
| action                | keyword |
| state                 | keyword |
| dialingMode           | keyword |
| optimizationParameter | integer |
| optimizationType      | keyword |
| campaignName          | keyword |
| campaignGroupName     | keyword |
| campaignGroupDBID     | keyword |
| campaignTemplateName  | keyword |
| groupName             | keyword |
| actualBusyFactor      | float   |
| actualHitRatio        | float   |
| actualOverdialRate    | Float   |
| actualTimeToComplete  | integer |
| lists                 | object  |



## Call Result Record (cxc-crr-\*)

| Field               | Type    |
|---------------------|---------|
| id                  | keyword |
| @timestamp          | date    |
| @endtime            | date    |
| ccid                | keyword |
| calluuid            | keyword |
| contact_info        | keyword |
| contact_info_type   | keyword |
| blockingRuleName    | keyword |
| duration            | integer |
| durationCall        | integer |
| durationACW         | integer |
| durationCPD         | integer |
| durationQueue       | integer |
| timeDialing         | date    |
| timeClientRinging   | date    |
| timeBadCallReleased | date    |
| timeClientPickedUp  | date    |

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| Field                    | Type    |
|--------------------------|---------|
| timeCPDFinished          | date    |
| timeQueued               | date    |
| timeAgentRinging         | date    |
| timeAgentEstablished     | date    |
| timeAMDDiverted          | date    |
| timeAbandoned            | date    |
| timeAgentCallReleased    | date    |
| callTime                 | date    |
| callResult               | keyword |
| dialingMode              | keyword |
| optimizationGoal         | integer |
| optimizationMethod       | keyword |
| listName                 | keyword |
| campaignName             | keyword |
| campaignGroupName        | keyword |
| sessionuuid              | keyword |
| campaignTemplateName     | keyword |
| groupName                | keyword |
| timezoneName             | keyword |
| timezoneNameCME          | keyword |
| timezoneOffset           | integer |
| agentLoginId             | keyword |
| scheduledTime            | date    |
| recordType               | keyword |
| recordStatus             | keyword |
| voiceTransferDestination | keyword |
| countryCode              | keyword |
| clientCountryCode        | keyword |
| areaCode                 | keyword |
| deviceTimezone           | keyword |
| disposition              | keyword |
| postalCode               | keyword |
| userData                 | object  |

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## Contact History Record (cxc-ldr-\*)

| Field                | Type    |
|----------------------|---------|
| id                   | keyword |
| @timestamp           | date    |
| ccid                 | keyword |
| campaignName         | keyword |
| campaignId           | integer |
| campaignGroupName    | keyword |
| campaignGroupId      | integer |
| campaignTemplateName | keyword |
| campaignTemplateId   | integer |
| groupName            | keyword |
| groupId              | integer |
| blockingRuleName     | keyword |
| blockingRuleId       | integer |
| listName             | keyword |
| listId               | integer |
| recordId             | integer |
| clientId             | keyword |
| chainId              | integer |
| chainN               | integer |
| contact_info         | keyword |
| contact_info_type    | keyword |
| recordType           | keyword |
| recordStatus         | keyword |
| deviceCountryCode    | keyword |
| deviceAreaCode       | keyword |
| deviceStateCode      | keyword |
| deviceTimezone       | keyword |
| deviceMask           | integer |
| postalCode           | keyword |
| disposition          | keyword |
| reason               | keyword |
| customFields         | object  |
| timestamp_iso8601    | date    |



## SMS/EMAIL Record (cxc-nexdr-\*)

| Field                 | Type    |
|-----------------------|---------|
| id                    | keyword |
| @timestamp            | date    |
| ccid                  | keyword |
| mediaType             | keyword |
| calluuid              | keyword |
| contact_info          | keyword |
| clientId              | keyword |
| chainId               | integer |
| chainN                | integer |
| from                  | keyword |
| subject               | keyword |
| listName              | keyword |
| campaignName          | keyword |
| groupName             | keyword |
| campaignGroupName     | keyword |
| campaignTemplateName  | keyword |
| sessionuuid           | keyword |
| messageID             | keyword |
| batchID               | keyword |
| status                | keyword |
| deliveryReceipt       | keyword |
| disposition           | keyword |
| callResult            | keyword |
| errorCode             | integer |
| errorMessage          | keyword |
| timeReceivedFromOCS   | date    |
| timeSubmittedToNexus  | date    |
| timeResponseReceived  | date    |
| timeOCSNotified       | date    |
| timeConsumerResponded | date    |
| optout                | boolean |
| userData              | object  |



## User Actions Record (cxc-audit-\*)

| Field         | Type    |
|---------------|---------|
| id            | keyword |
| requestID     | keyword |
| @timestamp    | date    |
| userName      | keyword |
| @endtime      | date    |
| duration      | integer |
| action        | Keyword |
| actionDetails | keyword |
| objectType    | keyword |
| objectSubtype | keyword |
| objectName    | keyword |
| objectID      | integer |
| apicall       | boolean |
| successful    | boolean |
| errorMessage  | text    |
| details       | text    |
| endPoint      | text    |
| changeSet     | object  |

## Elasticsearch Maintenance Recommendations

To help you better manage your indexes and snapshots and to prevent too many indexes from creating an overflow of shards, it is recommended that you set up a scheduled execution of Elasticsearch Curator:

1. Delete indexes older than 60 days according to the index name and mask.

- cxc-job-\*
- cxc-audit-\*
- cxc-crr-\*
- cxc-didr-\*
- cxc-ldr-\*
- cxc-nexdr-\*
- cxc-cgevent-\*
- cxc-contact-\*

2. Make a snapshot of each index.

- `cxc-analytics-*`

### Elasticsearch Index Purge

From the version 100.0.030.0003 onwards, CX Contact creates monthly Elasticsearch indices instead of daily indices. Monthly indices follow a different file format compared to daily indices.

Here are a few examples of daily indices that include the date/day as well in the file name:

- `cxc-didr-123-2022.07.01`
- `cxc-didr-123-2022.07.02`
- `cxc-didr-123-2022.07.03`

Note that the numbers 123 in the above examples denote the tenant number configured during provisioning.

Monthly indices, however, follow a different file naming convention and do not include the date. Here's an example for an index for the month of August:

- `cxc-didr-123-2022.08`

So, when you delete a single index file, you will lose a month's data instead of a specific day's. So, it is important to reconfigure Elasticsearch curator so that data is correctly purged.

#### Important

`cxc-analytics-*` indexes do not have a timestamp in their name and must not be deleted. Deleting a `cxc-analytics-*` index will result in the loss of all CX Contact Analytics Dashboard customizations.

For example, the following configuration would purge index files whose creation date is older than 90 days:

```
filters:
  filtertype: age
  source: creation_date
  direction: older
  unit: days
  unit_count: 90
```

It is recommended to change the purge duration to months as the index creation is also on a monthly basis. In order to ensure that index data from last 90 days is available, you must change the unit to months and `unit_count` to 4.

```
filters:
  filtertype: age
  source: creation_date
  direction: older
  unit: months
  unit_count: 4
```