Using Excel to report on InterAction® System Data

Introduction

The reporting tools in InterAction have become increasingly powerful in recent releases, but it can still be a challenge to generate reports on various important areas of system configuration.

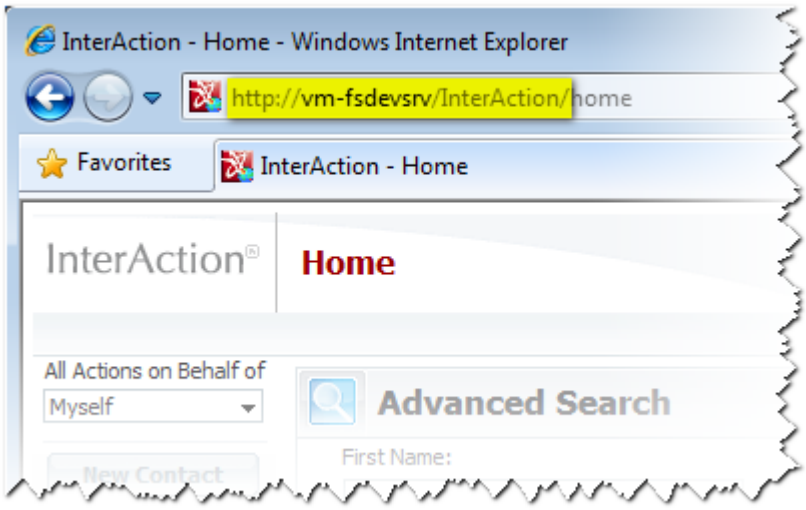
If you've ever needed to report on all the activity types configured in your system, or on your contact types or user groups for example, you've probably had to resort to either grabbing screenshots or else requiring IT resource to generate reports directly from the database.

In this paper we present a simple way to extract system information from InterAction into Microsoft® Excel®, from where you can analyse and report on it as required.

All you need is access to the InterAction web client, and Excel 2007 or 2010.

Extracting the data

Let's use activity types as an example - maybe you want to review the expiry settings for all currently configured activity types, or check which activity types users can create.

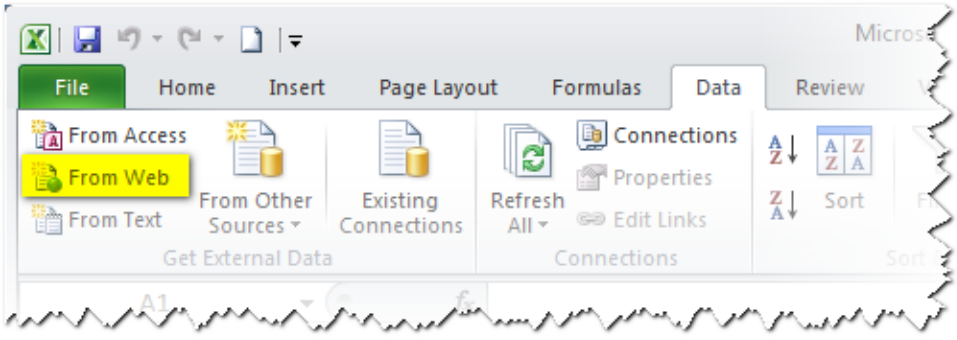


The first thing you'll need to know is the address of your InterAction Application Server.

To find this out, just go to the home page in the web client and look at the browser's address bar.

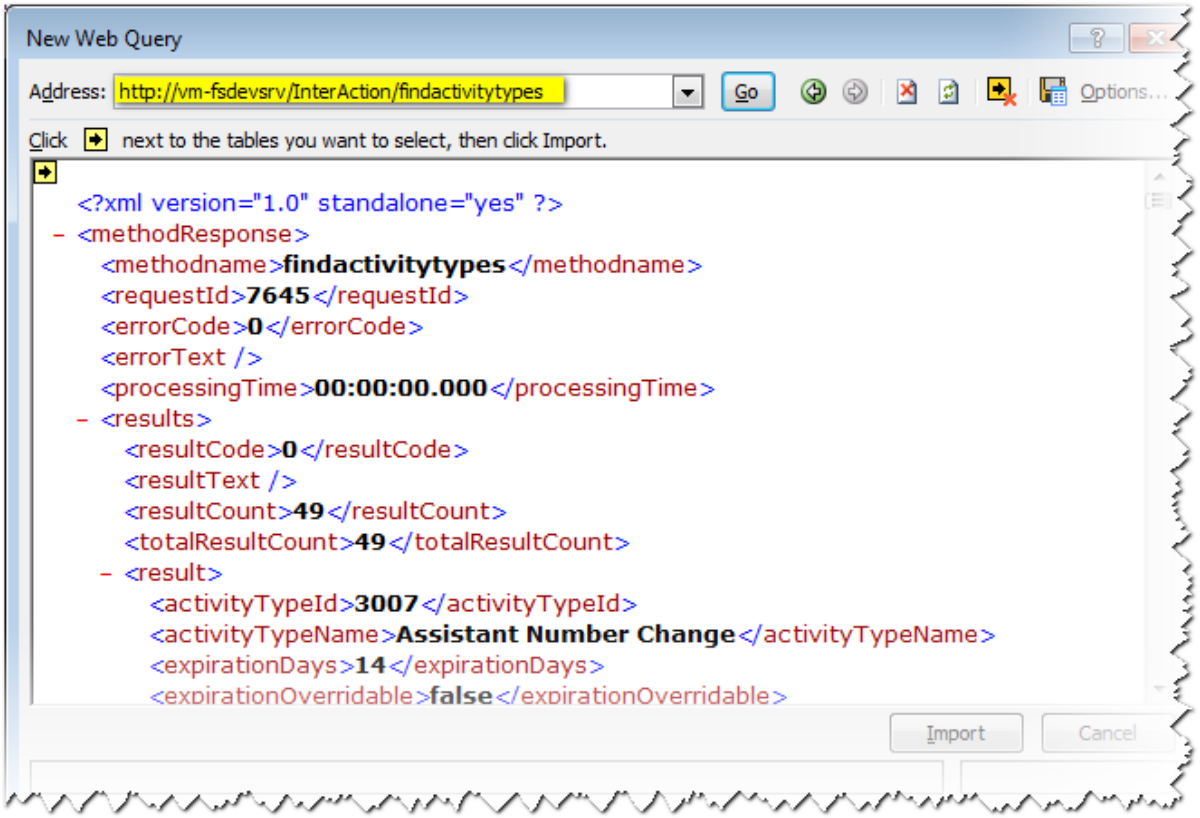
The server address is everything up to and including the "/InterAction/" - in our example it's "http://vm-fsdevsrv/InterAction/" (shown highlighted to the left).

Next, switch to Excel and create a new spreadsheet. Go to the Data ribbon, then click the "From Web" button (you may need to click the "Get External Data" button item first).



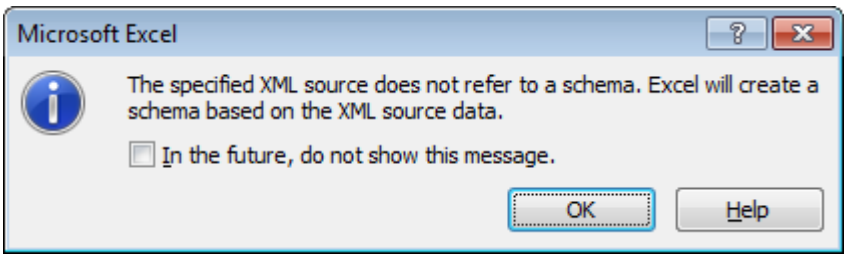
A dialog that is basically a small web browser will appear.

You'll use this to tell Excel the address of the data that you want it to import. The address will be the address to your InterAction server (we found this earlier), followed by the method name "findActivityTypes", because we want information about activity types. In our environment, the full address is "http://vm-fsdevsrv/InterAction/findActivityTypes". Enter the address, then click the Go button - you should see something like the screenshot below.

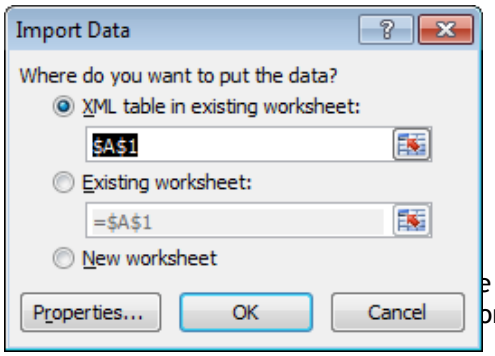


Next, click the Import button at the bottom right of the browser dialog.

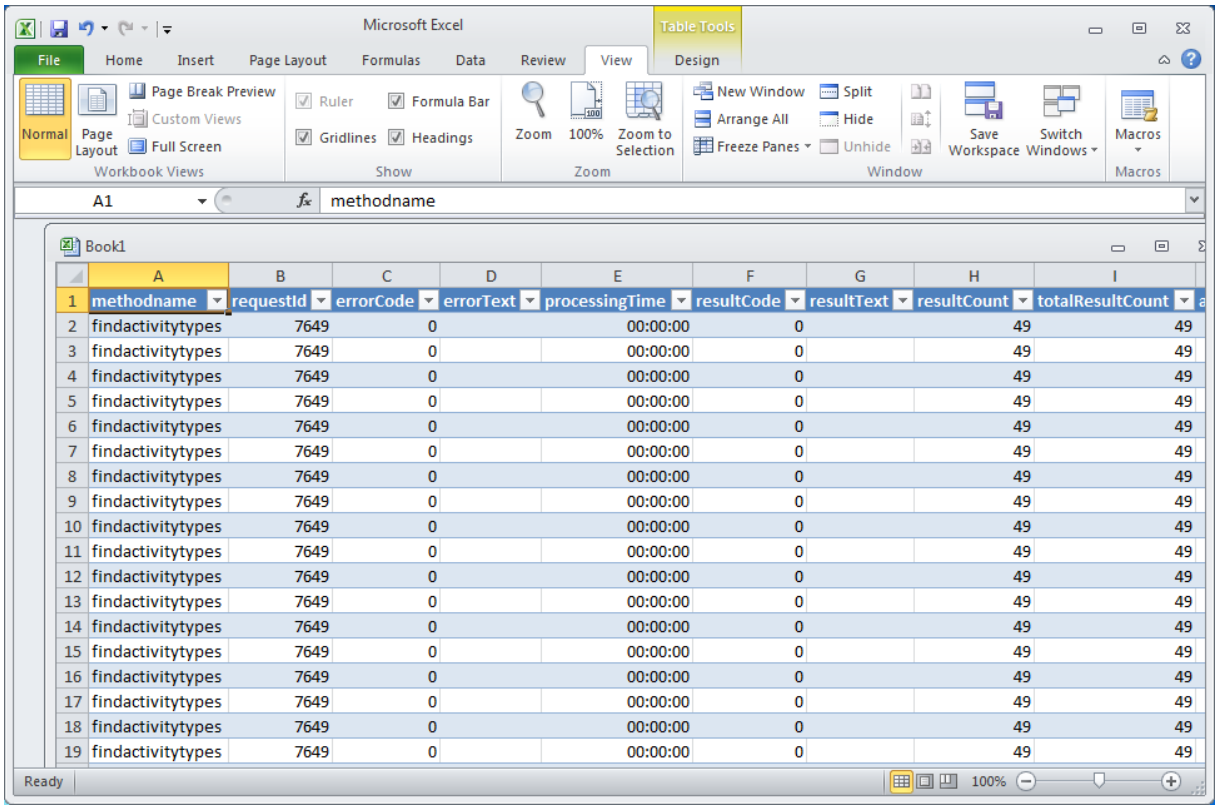
A warning dialog about schemas will be displayed - just click the OK button.



Next, Excel will ask you exactly where you want it to put the data in the spreadsheet. We're working in a new spreadsheet, so you can just click OK.



Next, you'll see the new spreadsheet containing data from InterAction:

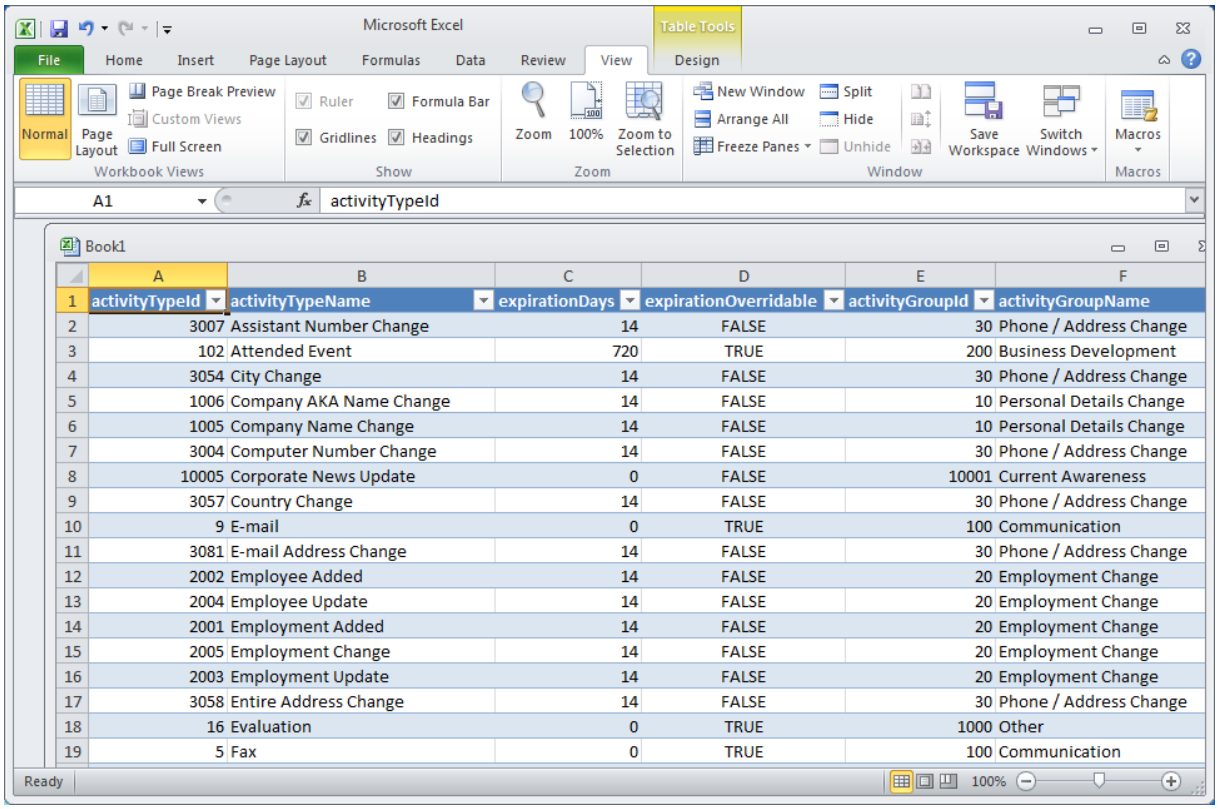


	A	B	C	D	E	F	G	H	I
1	methodname	requestId	errorCode	errorText	processingTime	resultCode	resultText	resultCount	totalResultCount
2	findactivitytypes	7649	0		00:00:00	0		49	49
3	findactivitytypes	7649	0		00:00:00	0		49	49
4	findactivitytypes	7649	0		00:00:00	0		49	49
5	findactivitytypes	7649	0		00:00:00	0		49	49
6	findactivitytypes	7649	0		00:00:00	0		49	49
7	findactivitytypes	7649	0		00:00:00	0		49	49
8	findactivitytypes	7649	0		00:00:00	0		49	49
9	findactivitytypes	7649	0		00:00:00	0		49	49
10	findactivitytypes	7649	0		00:00:00	0		49	49
11	findactivitytypes	7649	0		00:00:00	0		49	49
12	findactivitytypes	7649	0		00:00:00	0		49	49
13	findactivitytypes	7649	0		00:00:00	0		49	49
14	findactivitytypes	7649	0		00:00:00	0		49	49
15	findactivitytypes	7649	0		00:00:00	0		49	49
16	findactivitytypes	7649	0		00:00:00	0		49	49
17	findactivitytypes	7649	0		00:00:00	0		49	49
18	findactivitytypes	7649	0		00:00:00	0		49	49
19	findactivitytypes	7649	0		00:00:00	0		49	49

At first sight this doesn't look very useful. This is because InterAction returns data as hierarchical XML and Excel works with flat tabular data, so Excel has to duplicate some of the returned information to make it into a table.

To tidy up, just highlight the column headings from column A up to and including column I, then right click and click the Delete menu item. There'll also be an extra column at the furthest right headed "resultBytes" which you can delete.

This will leave you with just the raw data on activity types:



activityTypeId	activityTypeName	expirationDays	expirationOverridable	activityGroupId	activityGroupName
3007	Assistant Number Change	14	FALSE	30	Phone / Address Change
102	Attended Event	720	TRUE	200	Business Development
3054	City Change	14	FALSE	30	Phone / Address Change
1006	Company AKA Name Change	14	FALSE	10	Personal Details Change
1005	Company Name Change	14	FALSE	10	Personal Details Change
3004	Computer Number Change	14	FALSE	30	Phone / Address Change
10005	Corporate News Update	0	FALSE	10001	Current Awareness
3057	Country Change	14	FALSE	30	Phone / Address Change
9	E-mail	0	TRUE	100	Communication
3081	E-mail Address Change	14	FALSE	30	Phone / Address Change
2002	Employee Added	14	FALSE	20	Employment Change
2004	Employee Update	14	FALSE	20	Employment Change
2001	Employment Added	14	FALSE	20	Employment Change
2005	Employment Change	14	FALSE	20	Employment Change
2003	Employment Update	14	FALSE	20	Employment Change
3058	Entire Address Change	14	FALSE	30	Phone / Address Change
16	Evaluation	0	TRUE	1000	Other
5	Fax	0	TRUE	100	Communication

From here you can use all of the standard Excel tools for manipulating, sorting, filtering and reporting on the data.

Available methods

You can use the above process for other types of system data as well - see the table below for some examples.

Method	Data returned
findActivityTypes	Activity Types
findContactTypes	Contact Types
findGroups	Groups of users
findCountries	Configured countries
findFolderTypes	Configured folder types
findUsers	Information on InterAction users
findAppDefaults	System configuration parameters

organisations and professional services firms. Visit our web site for more information about our InterAction products and services.