EVE Extract 1.3

September 2022

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Contacting Q2

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For more information

For support issues that cannot be resolved with the information provided here, contact Q2 Customer Support at (833) 444-3469, option 1.

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EVE Extract

The Every Valuable Element (EVE) Extract is the next generation of the Q2 Data Extract. EVE brings you valuable online banking engagement event data together in one consistent format to power your data analysis efforts.

EVE is an extract that includes data sets intended to measure end-user engagement within the Q2platform and other Q2 products. EVE comes with a standard set of data that is sent to all financial institutions (FIs).

EVE is not a reporting tool. EVE only assembles defined data points. FIs are responsible for storing, analyzing, and visualizing the data within their own systems. EVE includes the same data as the Standard Data Extract except for the GTUserProperty extract.

Production and delivery

By default, EVE is produced as double pipe '||' delimited files on a nightly basis. These files are available through the Q2 MoveIT server at https://sftp.q2ebanking.com/ in the \Inbound\EVE_Extract directory. Q2 sets up and maintains this server, but your FI is responsible for pulling the files from this location. This server holds files from the past seven days. After the seven-day grace period, the files are deleted. The files cannot be regenerated or retransmitted.

The file names follow the standard naming convention outlined in Delivered file names.

Delivered file names

EVE delivers the following files:

####_AccountNotification.yyyyMMdd.HHmmss.txt

####_AuditScore.yyyyMMdd.HHmmss.txt

####_AuthorizingGTDevice.yyyyMMdd.HHmmss.txt

####_ClosedAccountData.yyyyMMdd.HHmmss.txt

####_CustomerEnabledTreasuryFeatures.yyyyMMdd.HHmmss.txt

####_CustomerLevelGTEntitlements.yyyyMMdd.HHmmss.txt

####_CustomerGTLimits.yyyyMMdd.HHmmss.txt

####_CustomerPIIData.yyyyMMdd.HHmmss.txt

####_DeliveredSecurityAlert.yyyyMMdd.HHmmss.txt

####_DirectConnectLogin.yyyyMMdd.HHmmss.txt

####_DirectConnectTransactions.yyyyMMdd.HHmmss.txt

####_DisclaimerAcceptance.yyyyMMdd.HHmmss.txt

####_EStatementData.yyyyMMdd.HHmmss.txt

####_GeneratedACHActivity.yyyyMMdd.HHmmss.txt

####_GeneratedTransactionActivity.yyyyMMdd.HHmmss.txt

####_GoalsData.yyyyMMdd.HHmmss.txt

####_LogonActivity.yyyyMMdd.HHmmss.txt

####_LogonAuthenticationDetail.yyyyMMdd.HHmmss.txt

####_NotificationContactDetail.yyyyMMdd.HHmmss.txt

####_PFMHostAccountDataElements.yyyyMMdd.HHmmss.txt

####_PFMHostTransactionHistory.yyyyMMdd.HHmmss.txt

####_PFMTransactionClassifications.yyyyMMdd.HHmmss.txt

####_PhoneNumber.yyyyMMdd.HHmmss.txt

####_ProductIDs.yyyyMMdd.HHmmss.txt

####_Recipient.yyyyMMdd.HHmmss.txt

####_RecipientAccount.yyyyMMdd.HHmmss.txt

####_RecipientFI.yyyyMMdd.HHmmss.txt

####_RecurringTransactions.yyyyMMdd.HHmmss.txt

####_RemoteDepositActivity.yyyyMMdd.HHmmss.txt

####_Subsidairy.yyyyMMdd.HHmmss.txt

####_TemplatePayments.yyyyMMdd.HHmmss.txt

####_Tempates.yyyyMMdd.HHmmss.txt

####_ThirdPartyData.yyyyMMdd.HHmmss.txt

####_UnProcessedTransactions.yyyyMMdd.HHmmss.txt

####_UserAccountData.yyyyMMdd.HHmmss.txt

####_UserAccountNickname.yyyyMMdd.HHmmss.txt

####_UserAdmin.yyyyMMdd.HHmmss.txt

####_UserData.yyyyMMdd.HHmmss.txt

####_UserDataPII.yyyyMMdd.HHmmss.txt

####_UserEnabledAlerts.yyyyMMdd.HHmmss.txt

####_UserEnrollment.yyyyMMdd.HHmmss.txt

####_UserLevelGTEntitlements.yyyyMMdd.HHmmss.txt

####_UserLogon.yyyyMMdd.HHmmss.txt

####_UserThemes.yyyyMMdd.HHmmss.txt

Files will either contain data for the current or previous day's user behavior. The following files contain data for the previous day's user behavior. The date in their file names will display as the previous day's date. For example, if today is 10/6/2019, the date in the file name will appear as 20191005.

- AccountNotification
- AuditScore
- AuthorizingGTDevice
- DeliveredSecurityAlert
- DirectConnectLogin
- DirectConnectTransactions
- DisclaimerAcceptance
- GeneratedACHActivity
- GeneratedTransactionActivity
- LogonActivity
- LogonAuthenticationDetail
- PFMHostTransactionHistory
- PFMTransactionClassifications
- RemoteDepositActivity
- UserEnrollment

All other files will contain data for the current day's user behavior.

Changing file structure

Q2 plans to add new files and columns to existing files to improve the extract. We plan to work closely with our testing partners to communicate these changes in advance.

The Online Banking User ID

The one constant that runs through all EVE extracts is the user_id. This unique identifier references the online banking users in the UserData extract. You can trace the actions of a single user throughout the data with their user_id information.

Requirements

EVE requires UUX version 4.1 or later. For FIs with Direct Connect, EVE requires Direct Connect version 2.0.33 or later.

Empty files

If any add-on products are not purchased, files containing that data will be empty.

Implementation specifics

Timeline

EVE's estimated deployment time is approximately one month. We will announce a release six weeks before deployment. Releases will include updated documentation that details any new extracts with column names and data types, as well as any new columns and their data types. New columns are added to the right of the existing extract.

We will also include sample extracts containing the top 1000 rows of sample data to the location where files are delivered (for example, Inbound\EVE_Extract\SAMPLE\{Version Number}) for all extracts to help you prepare for the production release.

Please become a part of the EVE Group in the Q2 Customer Portal to receive updates about the preview release and the production release.

Plan for changes

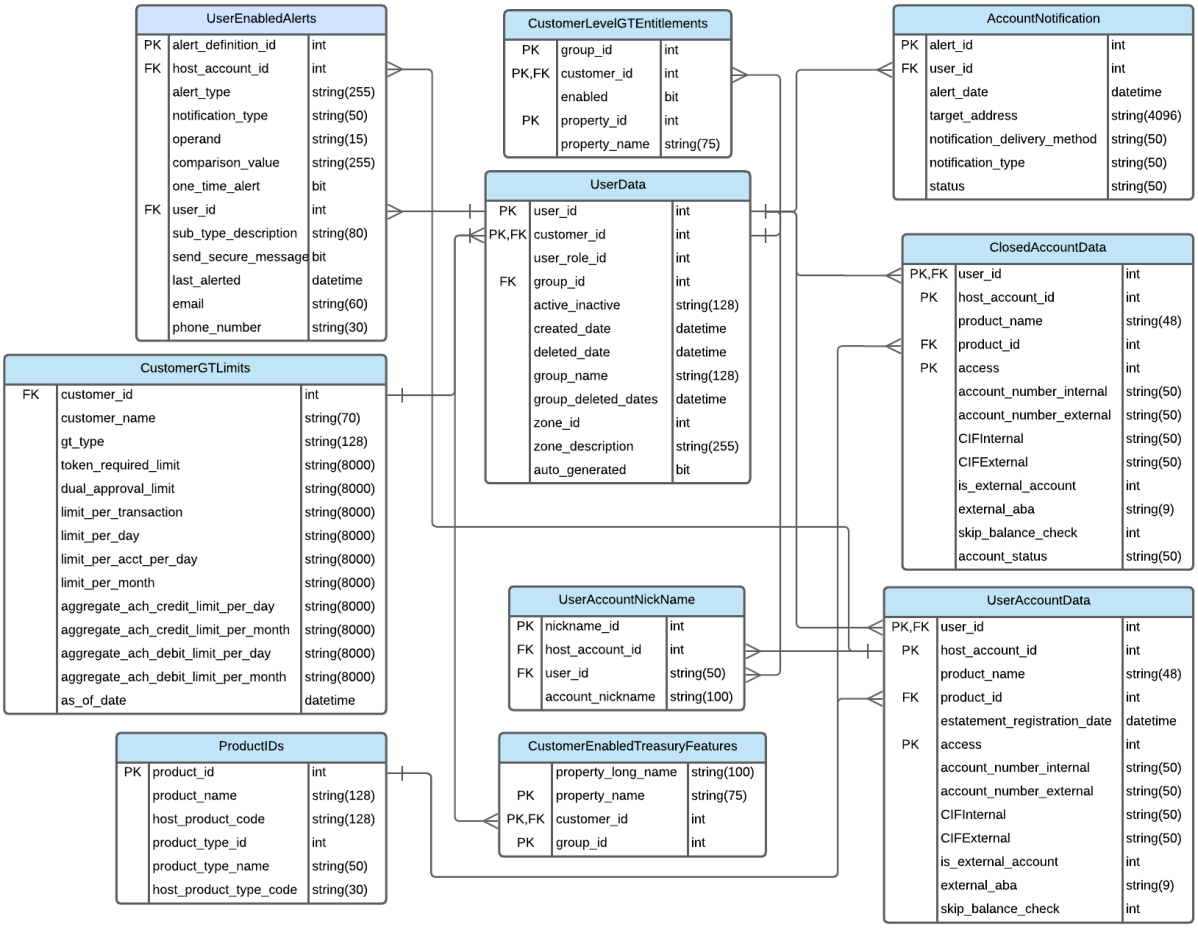
When building your file retrieval process, it is critical to account for the introduction of additional files or data elements. We will work to communicate any structural changes to the name or format of the files ahead of time, but it is important that your system be flexible enough to adapt to small changes. Expect EVE to evolve.

Current data schema

The following diagrams outline the data elements that comprise each extract file.

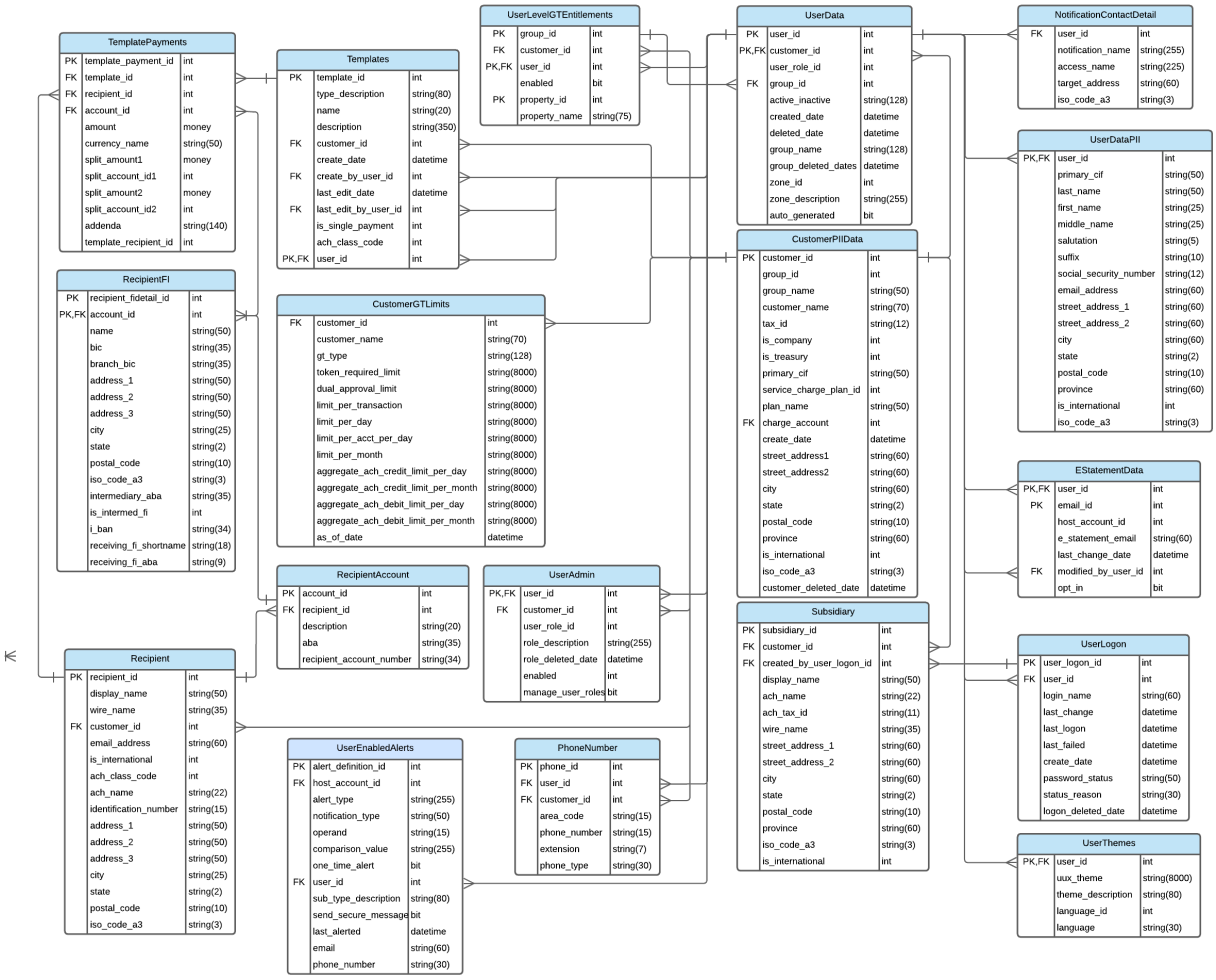
Accounts

These extracts contain information about accounts, such as account type and user access.



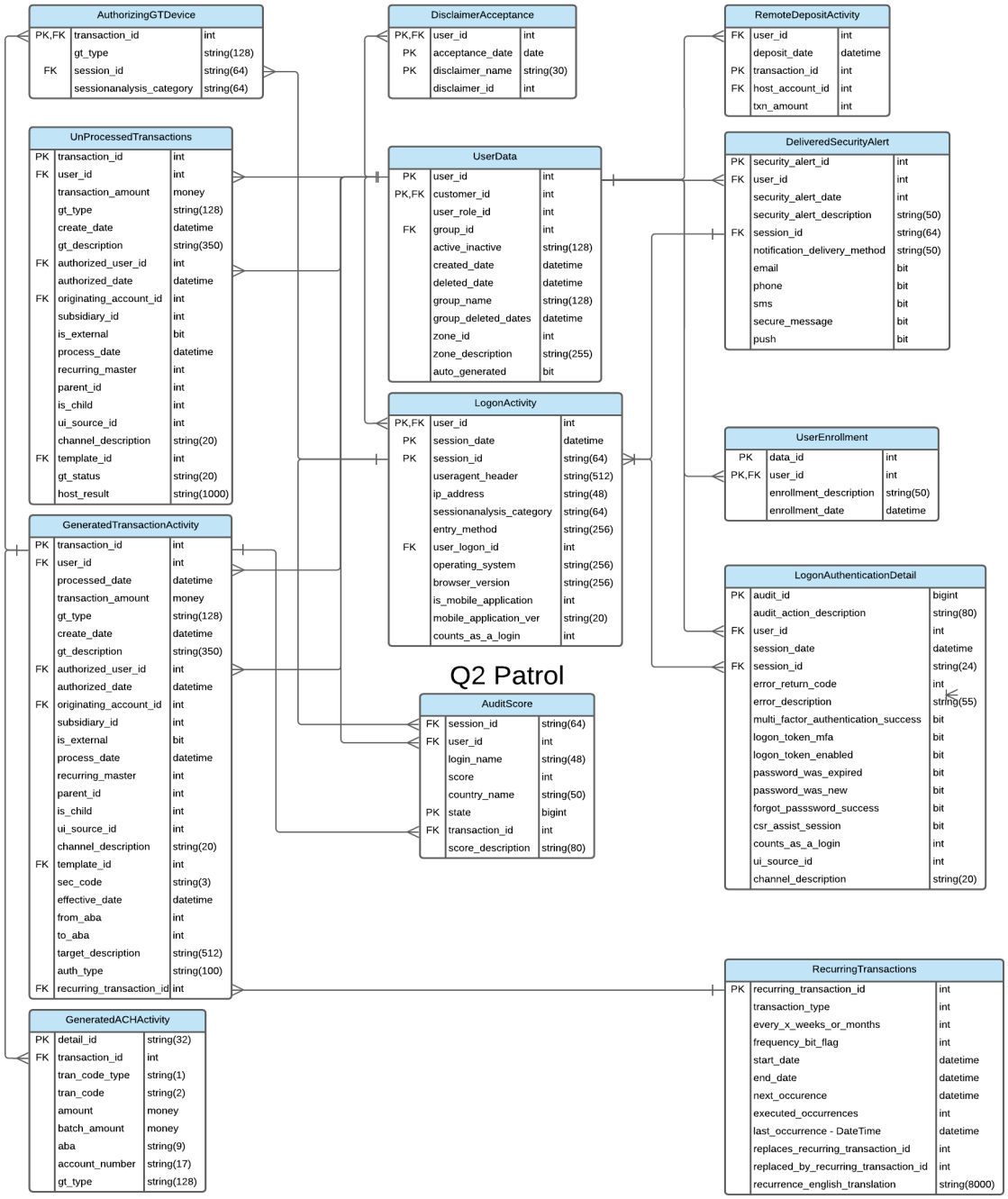
Users and Customers

These extracts contain static information about a user, such as their name, phone number, and email.



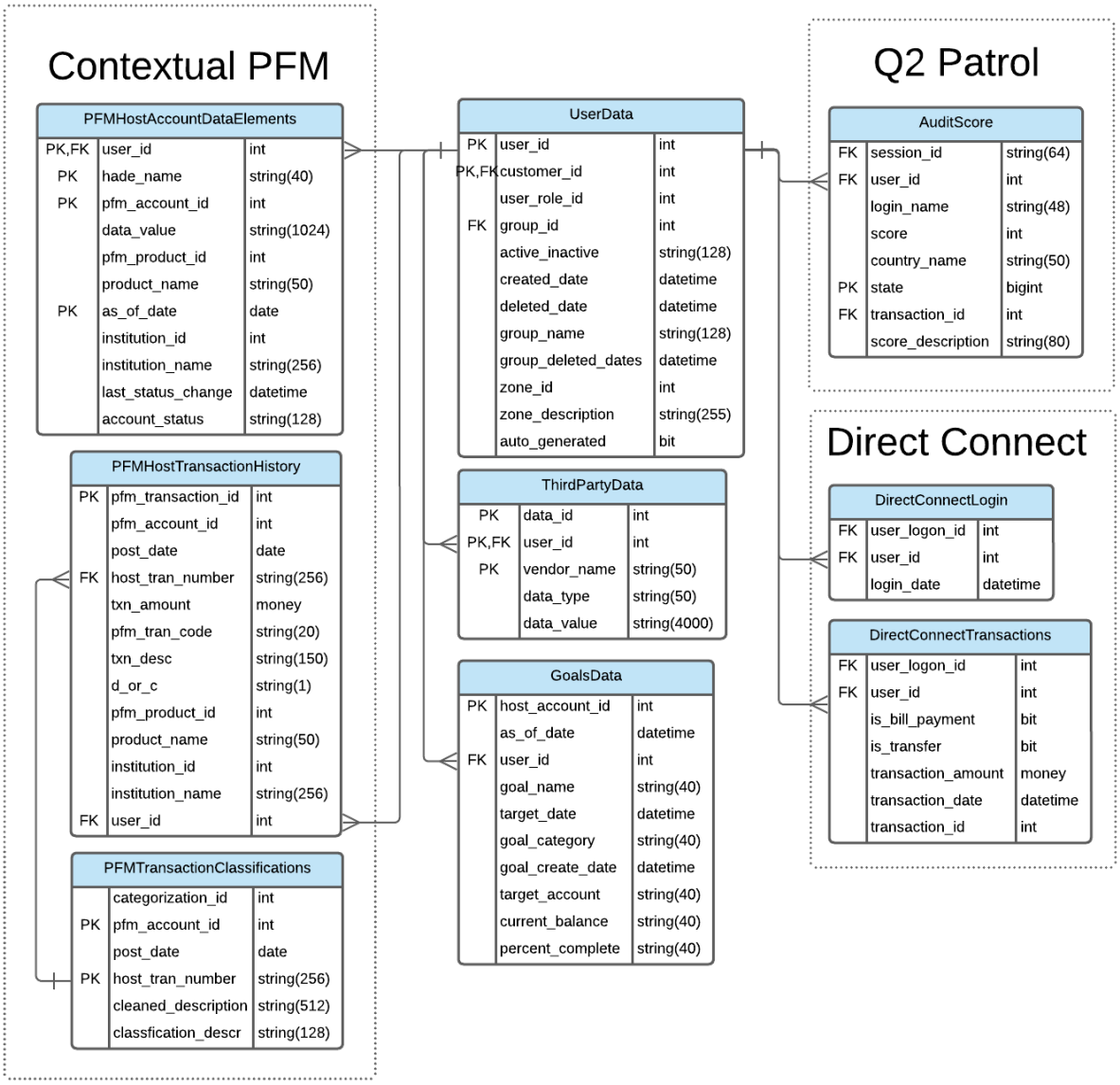
Behavior

These extracts contain information on end-user behavior within the main application. This data consists of generated transactions, mRDC transactions, and login information.



Add-on products

These extracts provide information generated by additional Q2 products, such as Q2 Patrol and Contextual PFM.



Sample data

The sections below detail each of the data files that make up the EVE set of extracts. Each section shows a table of the data elements included and an example of these data elements in a double-pipe delimited format.

AccountNotification

AccountNotification

alert_id	user_id	alert_date	target_address	notification_delivery_method	notification_type	status
23470	107762	2020-04-29 04:05:33.740	16512709615	SMS	HadeCurrencyAlert	Delivered
23475	13868	2020-04-29 04:05:33.740	cisnorth@yahoo.com	Email	HadeCurrencyAlert	Delivered
23486	12174	2020-04-29 04:15:14.523	kellywadeharris@sbcglobal.net	Email	PostedTransactionAlert	Delivered

Suggested storage strategy

- Add new data daily to destination store.
- Use alert_id as the primary key.

AuditScore

AuditScore

session_id	user_id	login_name	score	country_name	state	audit_id	transaction_id	score_description
3ane5vs2awy1fexisnjrgzx4	86108	q2alerts	1			3916238130		LogonUser
4m5g3ttwtk4abcgtuo5qnavq	3961099	135079	1	United States	TX	3916299851		ValidateLogonTemporaryAccessCode
bc15yqcqyecpi0azjpst5p1w	368068	101440311	0	United States	AK	3916350115	7041558	AuthorizeAchPayment

Suggested storage strategy

- Add new data daily to destination store.
- The primary key is the audit_id.

> **Note:** The transaction_id is null if the score_description column is associated with a login.

A score of 1 is a normal score. This is due to the nature of Q2 Patrol. It asks the question, “Is this normal?” If the answer is “Yes,” the login is given a score of 1. If the answer is "No," it is given a score of 0. A score of -1 indicates a timeout occurred, and Q2 Sentinel or Q2 Patrol could not assign an accurate score.

AuthorizingGTDevice

AuthorizingGTDevice

transaction_id	sessionanalysis_category	gt_type	session_id
242518	Phone	ExternalTransfer	zfum02xkmvqo1ivxs4vocwl5
242525	Desktop	FundsTransfer	gzbt2ugbsvzyhamxavckgmyu
242557	Phone	AchPayment	fce2vl5abkjk35eh4rhhfuwj

Suggested storage strategy

- Add new data daily to destination store.
- Use transaction_id as the primary key.

ClosedAccountData

ClosedAccountData

user_id	host_account_id	product_name	product_id	access	account_number_internal	account_number_external
100	18205	Assoc Money Market	128	2	918000004372	918000004372
101	13982	Basic Business	99	2	711700000676	711700000676

ClosedAccountData (cont'd)

user_id	host_account_id	product_name	product_id	access	account_number_internal	account_number_external
102	36630	1 YR IRA	243	2	609900401374	609900401374
103	34556	Fully Analyzed Comm	122	2	703100000165	703100000165

ClosedAccountData

CIFInternal	CIFExternal	is_external_account	external_aba	skip_balance_check	account_status
BAD1745	650125	0	123456789	0	Dormant
BAD1883	824040	0	123456789	0	Closed
SAA0783	220318	0	63116025	0	Dormant
CAA0266	204458669	0	63116025	0	Closed

Suggested storage strategy

- Replace with latest extract from each day.
- Use a composite key of user_id, host_account_id, and access.

CustomerEnabledTreasuryFeatures

CustomerEnabledTreasuryFeatures

propert_long_name	property_name	customer_id	group_id
Information Reporting Feature Access Company Entitlements Report	InformationReportingFeatureAccess/CompanyEntitlementsReport	65418	92
Multi Transfer Enabled	Customer/MultiTransfer/Allow/Enabled	68919	92
Show Class Code Policy Element	Customer/ShowSecCodePolicyElement	57280	66
Mobile: Enable Mobile Deposit Capture	FeatureUser/EnableMobileCapture	65731	66

Suggested storage strategy

- Replace with latest extract from each day
- Use a composite key of group_id, customer_id, and property_name.

> **Note:** This extract will only include data, at the customer level, for users that are in a group with Treasury enabled or IsCompany enabled in Q2central. The only features included will be those included in the Treasury product.

CustomerGTLimits

CustomerGTLimits

customer_id	customer_ name	token_required_ limit	dual_approval_ limit	limit_per_ transaction	limit_per_day	limit_per_acct_ per_day	limit_per_ month	aggregate_ach_limit_ per_day
11	Texas Cement Inc.	-1	-1	0	0	0	0	0
11	Texas Cement Inc.	-1	-1	9999999.99	999999.99	999999.99	99999.99	0
30	Brian Simon	10.00	11000000	1000000	1000000	1000000	1000000.00	1000000.00

Aggregates

aggregate_ach_credit_limit_per_month	aggregate_ach_debit_limit_per_day	aggregate_ach_debit_limit_per_month	gt_type	as_of_date
0	0	0	Wire transfer	2018-03-05 14:38:07.143
0	0	0	External transfer	2018-03-05 14:38:07.143
1000000.00	1000000.00	1000000.00	ACH single receipt	2018-03-05 14:38:07.143

Storage strategy

This extract has no primary key. We have included the field as_of_date that is the date of the extract. Create an autogenerated ID for each row, so you can track the changes of limits over time. This will not include any change that happened within a day. These limits are snapshots at the time of extraction.

CustomerLevelGTEntitlements

CustomerLevelGTEntitlements

group_id	customer_id	enabled	property_id	property_name
9	1	1	21	GeneratedTransaction/AchCollection
9	1	1	22	GeneratedTransaction/AchCollection/Authorize
14	4380	0	83	GeneratedTransaction/EFTPS
14	4380	0	84	GeneratedTransaction/EFTPS/Authorize

Suggested storage strategy

- Replace with latest extract from each day.
- Use a composite key of group_id, customer_id, and property_id.

CustomerPIIData

CustomerPIIData

customer_id	group_id	group_ name	customer_ name	tax_id	is_ company	is_ treasury	primary_ cif	service_ charge_ plan_id	plan_ name	charge_ account
127297	2	Business Customers	JJR Tennis	111111113	1	1	15688	0	No Charge	
98898	1	Retail Users	William Easter	121212121	1	0	238731	0	No Charge	
366888	3	Consumer	Kajsa Dehaan		0	0	299914	0	No Charge	

Additional data

create_date	street_ address1	street_ address2	city	state	postal_ code	province	is_international	iso_code_ a3	customer_deleted_ date
2018-11-05 14:02:00.753	1675 E Valley Rd		Santa Barbara	CA	93108		0	USA	

Additional data (cont'd)

create_date	street_ address1	street_ address2	city	state	postal_ code	province	is_international	iso_code_ a3	customer_deleted_ date
2018-11-30 09:37:02.007	635 S SPENCER		HINTON	OK	73047		0	USA	
2015-05-04 16:08:01.530	206 W. Island	Apt #3	Colfax	WA	99111		0	USA	

Suggested storage strategy

- Replace with latest extract from each day.
- Only users who have not been deleted within the last 30 days will be sent.
- The charge_account column is the host_account_id column from the UserAccountData extract.

DeliveredSecurityAlert

DeliveredSecurityAlert

security_alert_id	user_id	security_alert_date	security_alert_description	session_id	notification_delivery_method	email	phone	sms	secure_message	push
198772	11546	2020-04-29 06:30:58.230	InvalidPassword	tyzgbdxwqfmwm0hlvbzuuw41	Email	1	0	0	1	0
198774	14879	2020-04-29 07:03:38.760	ValidSecureAccessCode	glfezp4jxjb04rjkeav4mzlm	Email	1	0	0	0	1
198855	16450	2020-04-29 15:18:06.603	UserProfileUpdated	gzgxrvnphh5uqf4e3etpvcwa	Email	1	0	0	0	0

Suggested storage strategy

- Add new data daily to destination store.
- Use security_alert_id as the primary key.

> **Note:** You must have UUX version 4.2.2.4003 or later to receive the DeliveredSecurityAlert file.

DirectConnectLogin

Directconnectlogin

user_logon_id	user_id	login_date
8295	1	2018-11-05 14:02:00.753
300004	2	2018-11-30 09:37:02.007
300028	3	2015-05-04 16:08:01.530

Suggested storage strategy

- Add new data daily to destination store.
- There is no primary key.

Note: You must have Direct Connect version 2.0.33 or later to receive the DirectConnectLogin file.

DirectConnectTransactions

DirectConnectTransactions

user_logon_id	user_id	is_bill_payment	is_transfer	transaction_amount	transaction_date	transaction_id
8295	1	0	1	157.00	2021-06-01 12:00:00.003	100
300004	2	1	0	100.00	2021-07-01 12:00:00.003	103
300028	3	0	1	41.00	2021-06-01 12:00:00.525	107

Suggested storage strategy

- Add new data daily to destination store.
- There is no primary key.

> **Note:** You must have Direct Connect version 2.0.33 or later to receive the DirectConnectTransactions file.

DisclaimerAcceptance

DisclaimerAcceptance

user_id	acceptance_date	disclaimer_name	disclaimer_id
1	2017-11-15 16:00:19.520	PFM Disclaimer - PFM Interface	5
2	2017-11-15 13:21:58.800	mRDC	9
3	2017-11-15 12:52:02.270	AddExternalAccount	10

Suggested storage strategy

- The user_id, acceptance_date, and disclaimer_name form the primary key.
- Add new data daily to destination store.

The file PFMDisclaimers will be replaced by DisclaimerAcceptance and includes anything that has a disclaimer.

EStatementData

EStatementData

user_id	email_id	host_account_id	e_statement_email	last_change_date	modified_by_user_id	opt_in
3253	101	52406	richard@richard.com	2021-01-08 9:24:00.052	3253	1

EStatementData (cont'd)

user_id	email_id	host_account_id	e_statement_email	last_change_date	modified_by_user_id	opt_in
3253	102	52429	2COOL4SCHOOL@GGGG.COM	2021-05-28 11:28:00.003	3253	0
3254	103	52424	JVBASKETBALL@GGGGG.COM	2020-11-08 18:56:00.003	3254	1
19337	104	28409	John.Smith201@woot.com	2020-07-20 01:18:00.525	1933	1

Suggested storage strategy

- Replace with latest extract from each day.
- Use a composite key of email_id and user_id.

> **Note:** If e-statements are provided by a third-party vendor, this file will be sparse.

GeneratedACHActivity

GeneratedACHActivity

detail_id	transaction_id	tran_code_type	tran_code	amount	batch_amount	aba	account_number	gt_type
11127-b	3698127	C	22	2151.810	2151.81	123456789	23423478	AchBatch

GeneratedACHActivity (cont'd)

detail_id	transaction_id	tran_code_type	tran_code	amount	batch_amount	aba	account_number	gt_type
11128-b	3838614	C	22	2447.2000	2447.2	987654321	45000000	AchBatch
11129-b	3854456	C	22	2181.8400	144.28	999888777	10101010	Payroll
11130-b	3854456	C	27	39.12	144.28	111222333	2020202	Payroll

Suggested storage strategy

- Add new data daily to destination store.
- detail_id – primary key unique to this set. This is the identifier for each detail transaction item.
- transaction_id – references back to the GeneratedTransactionActivity data.
- If your FI does not perform ACH Activities, this file contains headers and no data.

> **Note:** The batch_amount column is the same as the transaction_amount column in the GeneratedTransactionActivity file.

Typical values for tran_code_type

- P – prenote credit
- A – prenote debit
- D – debit
- C – credit

Typical values for tran_code

- 22 - Credit To Checking
- 23 - Prenote DDA Credit
- 27 - Debit To Checking
- 28 - Prenote DDADebit
- 32 - Credit To Savings
- 33 - Prenote SAV Credit
- 37 - Debit To Savings
- 38 - Prenote SAVDebit
- 24 - Zero dollar
- 34 - Zero dollar

- 52 - Loan Deposit Credit
- 53 - Prenote Loan Credit
- 54 - Zero dollars

GeneratedTransactionActivity

GeneratedTransactionActivity

transaction_id	user_id	processed_date	transaction_amount	gt_type	create_date	gt_description	authorized_user_id	authorized_date	originating_account_id	subsidiary_id	is_external
4457047	463795	2017-07-19 11:21:57.407	1538	Domestic Wire	2017-07-19 11:18:43.407	Repay Mom	46795	2017-07-19 11:19:50.407	8972	11	0
4439243	442266	2017-07-18 12:34:22.693	5499	AchPayment	2017-07-18 12:32:21.670	Visa	442266	2017-07-18 12:33:22.690	789543		0
4366290	78410	2017-07-14 01:16:26.163	130	StopPayment	2017-07-14 01:15:25.160		4366290	2017-07-14 01:16:25.160	29541		0

GeneratedTransactionActivity (cont'd)

transaction_id	user_id	processed_date	transaction_amount	gt_type	create_date	gt_description	authorized_user_id	authorized_date	originating_account_id	subsidiary_id	is_external
4367321	456521	2017-07-12 15:27:32.007		ChangeOfAddress	2017-07-12 15:25:55.007		456521	2017-07-12 15:26:55.007	601239		0

Additional data

process_date	recurring_master	parent_id	is_child	ui_source_id	channel_description	template_id	sec_code	effective_date	from_aba	to_aba	target_description	auth_type	recurring_transaction_id
2017-07-19 00:00:00.000	1		0	1	OnlineBanking	100		2017-07-20 00:00:00.000		123456789	ZZZ Goods and Services	Online	1

Additional data (cont'd)

process_date	recurring_master	parent_id	is_child	ui_source_id	channel_description	template_id	sec_code	effective_date	from_aba	to_aba	target_description	auth_type	recurring_transaction_id
2017-07-19 00:00:00.000	0		0	2	VoiceBanking		PPD	2017-07-20 00:00:00.000		123456789		Mobile Authorization over Voice	2
2017-07-14 00:00:00.000	0		0	1	OnlineBanking			2017-07-14 00:00:00.000		123456789	paid cash instead		3
2017-07-12 00:00:00.000	0		0	3	BackOffice			2017-07-12 00:00:00.000		123456789	Address:1 Research Boulevard		

Note: The is_external column indicates whether the originating account of the generated transaction is internal or external. A value of 0 indicates the originating account is an internal account while a value of 1 indicates an external account.

Note: The process_date is the date a transaction is scheduled to be processed. The processed_date is the EXACT date and time that the funds entered or exited the FI.

> **Note:** The GeneratedTransactionActivity extract only includes transactions with a status of Processed. Transactions that are in a different status are included in the UnProcessedTransactions extract.

Suggested storage strategy

- Add new data daily to destination store.
- Use transaction_id as primary key.

The transaction amount column contain nulls for the ChangeOfAddress and CheckReorder GT types. gt_type is a string that describes the transaction type.

Typical values for gt_type

- AchBatch
- AchCollection
- AchPassThru
- AchPayment
- AchReceipt
- CheckReorder
- DomesticWire
- Eftps
- ExternalTransfer

- Funds Transfer
- InternationalWire
- Payroll
- SendCheck
- StopPayment

Typical values for channel_description

- API
- BackOffice
- Fax
- Merchant
- Notifications
- OnlineBanking
- OpenBanking
- TextBanking
- VoiceBanking

Typical values for sec_code

- PPD
- CCD
- ACK
- ADV
- ARC
- ATX
- CIE
- COR
- CTX
- DNE
- ENR
- MTE
- POP
- POS
- RCK
- SHR

- TEL
- TRC
- TRX
- WEB
- XCK
- IAT
- BOC

GoalsData

GoalsData

host_account_id	as_of_date	user_id	goal_name	target_date	goal_category	goal_create_date	target_amount	current_balance	percent_complete
51478	2021-04-05-15:45:28.480	31663	My home purchase	2021-04-15T00:00:00-05:00	Home purchase	2020-08-09T03:50:35.508-05:00	5000	0	0
53018	2021-04-05-15:45:28.480	31961	My home improvement	2021-04-30T00:00:00-05:00	Home improvement	2020-09-01T18:56:29.226-05:00	20000	20785.82	1.04

GoalsData (cont'd)

host_account_id	as_of_date	user_id	goal_name	target_date	goal_category	goal_create_date	target_amount	current_balance	percent_complete
63904	2021-04-05-15:45:28.480	37799	My health	2022-09-01T00:00:00-05:00	Health	2021-03-19T08:50:12.107-05:00	1000	626.05	0.63
61870	2021-04-05-15:45:28.480	38443	My emergency fund	2021-12-31T00:00:00-06:00	Emergency fund	2021-02-22T20:50:47.555-06:00	10000	3769.8	0.38

Suggested storage strategy

Note: The data in this extract updates only when a user logs in.

- Either replace with latest extract every day or if there is a business need to track changes over time, add an insert_date column to your model.
- Use host_account_id as primary key.

Note: It is possible for the percent complete to be over 100 percent. For example, if the target_amount is $20 and the current_balance is $25, then percent_complete will be 1.25.

LogonActivity

LogonActivity

user_id	session_date	session_id	useragent_header	ip_ address
44444	2017-07-20 00:00:02.34	aw4zebwrdeawvbh3chaf1c2l	Q2Monitor	127.0.0.0
10142	2017-07-20 00:00:03.193	oecbja03zs4hfk4f1cj5p1zq	ngam-ios/1013 CFNetwork/811.5.4 Darwin/16.6.0	127.0.0.0
38024	2017-07-20 00:00:03.577	inkxt2qohtdgc0oiwxjooquz	Mozilla/5.0 (Linux; Android 4.2.1; en-us; Nexus 4 Build/JOP40D) AppleWebKit/535.19 (KHTML, like Gecko) Chrome/18.0.1025.166 Mobile Safari/535.19	127.0.0.0

Additional data

sessionanalysis_category	entry_method	userlogon_id	operating_ system	browser_ version	is_mobile_ application	mobile_application_ver	counts_as_a_login
Phone	Unknown	44456	Unknown	Unknown	0	Unknown	1
Tablet	CFNetwork	11148	Darwin	811.5.4	1	Unknown	0
Phone	Chrome	38000	Android	18.0.1025.166	1	Unknown	1

Suggested storage strategy

- Add new data daily to destination store.
- Use a composite key of user_id, session_date, session_id.
- The ip_address may contain null values.

Typical values

- Tablet
- Desktop
- Phone
- Monitor
- Smart TV
- Game console
- Unknown

LogonAuthenticationDetail

LogonAuthenticationDetail

audit_id	audit_action_description	user_id	session_date	session_id	error_return_code	error_description	multi_factor_authentication_success
522851067	LogonUser	35141	2019-06-02 00:00:42.763	3ane5vs2awy1fexisnjrgzx4	-86	UserLogonTacRequired	1
522851187	LogonUser		2019-06-02 00:01:59.713	4m5g3ttwtk4abcgtuo5qnavq	-193	PasswordUserAndPasswordDoNotMatch	0
522860563	LogonUser	379740	2019-06-02 02:20:58.863	bc15yqcqyecpi0azjpst5p1w	0	Success	1

Additional data

logon_token_mfa	logon_token_enabled	password_was_expired	password_was_new	forgot_password_success	csr_assist_session	counts_as_a_login	ui_source_id	channel_description
0	0	0	0	0	0	1	1	OnlineBanking

Additional data (cont'd)

logon_token_mfa	logon_token_enabled	password_was_expired	password_was_new	forgot_password_success	csr_assist_session	counts_as_a_login	ui_source_id	channel_description
0	0	0	0	0	0	0	2	VoiceBanking
0	0	0	0	0	0	1	1	OnlineBanking

Suggested storage strategy

- Add new data daily to destination store.
- Use audit_id as the primary key.

This extract can be combined with the LogonActivity file by joining on the session_id. This provides additional details for a login. These details include successful login, i.e., an error_code of 0 or whether a multi-factor authentication was successful. This increases the accuracy of any reports based on the LogonActivity file.

NotificationContactDetail

NotificationContactDetail

user_id	notification_name	access_name	target_address	iso_code_a3
99298	Call me	Mobile Authorization Code	9038190576	CAN
99316	E-mail me	Secure Access Code	bob.smith@email.com	na

NotificationContactDetail (cont'd)

user_id	notification_name	access_name	target_address	iso_code_a3
99364	Text me	Secure Access Code	999999999	USA

Suggested storage strategy

- This extract has no primary key. A user may have multiple target addresses for the same notification type.
- Replace with latest extract from each day.

PFMHostAccountDataElements

PFMHostAccountDataElements

user_id	hade_name	pfm_account_id	data_value	pfm_product_id	product_name
2558	CurrBal	16	158.58	30	Credit Card
2558	APR	16	0.18	30	Credit Card
2558	Minimum_payment	16	30.00	30	Credit Card
2558	Payment_due_date	49	2018-04-13T01:00:00-06:00	31	LOAN

PFMHostAccountDataElements (cont'd)

user_id	hade_name	pfm_account_id	data_value	pfm_product_id	product_name
2558	CurrBal	42	79786.03	10	Brokerage Account

Additional data

as_of_date	institution_id	institution_name	last_status_change	account_status
2018-03-26 03:30:28.000	11	Capitol One Credit Card	2017-02-17 14:51:36.000	Account is Visible, Normal State
2018-03-26 03:30:28.000	11	Capitol One Credit Card	2017-02-17 14:51:36.000	Account is Visible, Normal State
2018-03-26 03:30:28.000	11	Capitol One Credit Card	2017-02-17 14:51:36.000	Account is Visible, Normal State
2018-03-26 03:30:28.000	1	Harris Bank-Personal	2017-02-17 14:51:36.000	Account is Visible, Normal State
2018-03-26 03:30:28.000	1	Newport Group	2017-03-15 14:25:56.000	Account is Visible, Normal State

Suggested storage strategy

The Host Account Data Elements (HADEs) update only when a user logs in. However, each account will always be represented in the HADE file with the latest information available as long as the account resides in the Q2 database. To keep a row unique and see trends over time, use a composite key of user_id, hade_name, pfm_account_id, and as_of_date.

Suggested storage strategy

Element	Description
hade_name	Name of the value that is in the data_value column. Not every account will have every hade_name. For example, a checking account will not have a "minimum_ payment" HADE.
data_value	Data type, such as datetime or float, depends on the hade_name. If persisting this data in a SQL server or other database, make the column a VARCHAR.
pfm_account_id	Account id internal to Q2.
as_of_date	Date the extract is created. The HADEs extract is a daily snapshot. In order to preserve past snapshots, we added the as_of_date column.
product_name	MX category of the account type
last_status_ change	Keeps track of the date of the changes through the import process.

Suggested storage strategy (cont'd)

Element	Description
account_status	Status of the account. Accounts have the following possible statuses: • Account is Created but has not completed the PFM initialization process • Account is Open • Account is Visible, Normal State • Hidden Account Once an account is imported, it can be hidden again.

PFMHostTransactionHistory

PFMHostTransactionHistory

pfm_ transaction_id	pfm_ account_id	post_ date	host_tran_ number	txn_ amount	pfm_tran_code
32523	99	2018-02-05 12:00:00.000	TRN-8d056a61-4293-c01b-98c8-60157335cbcb	7.99	DEBIT
32522	99	2018-02-05 12:00:00.000	TRN-484780dc-17e5-7e22-7bb1-1931b75da9ff	10.00	CREDIT
32477	314	2018-02-05 12:00:00.000	TRN-b2b276bb-3c21-1914-a99e-1a52b2e35393	76.78	CREDIT

PFMHostTransactionHistory (cont'd)

pfm_ transaction_id	pfm_ account_id	post_ date	host_tran_ number	txn_ amount	pfm_tran_code
32478	314	2018-02-05 12:00:00.000	TRN-0333bb9c-f9f6-58d0-a925-45b05c2cedfd	32.46	DEBIT

Additional data

txn_desc	d_or_c	pfm_product_id	product_name	institution__id	institution_name	user_ id
NETFLIX.COM	D	1	Checking	35	Wells Fargo	4256
MOBILE DEPOSIT : REF NUMBER	C	1	Checking	35	Wells Fargo	4256
WWW.GETZS.COM 906-2263561 MI	C	16	Credit Card	18	Bank of America	2734
SHELL OIL XXXXXXX0015 BENZONIA M	D	19	Credit Card	18	Bank of America	2734

Suggested storage strategy

> **Note:** We no longer provide post-transaction history changes.

- Add new data daily to destination.
- Use pfm_transaction_id as the primary key.

Suggested storage strategy

Element	Description
pfm_transaction_id	The primary key for this extract. Adds new rows every day.
pfm_account_id	Automatically assigned by Q2 to any account an end user aggregates.
txn_amount	The pfm_tran_code determines if it is a debit or credit to an account. This number is always positive.
pfm_tran_code	Will be either "DEBIT" or "CREDIT."
txn_desc	Original description from the core.
product_name	MX category of the account type.

PFMTransactionClassifications

PFMTransactionClassifications

categorization_id	pfm_account_id	post_ date	host_tran_ number	cleaned_description	classification_desc
367	32444	2018-01-09 07:00:00.000	TRN-986bcce6-3265-3cbe-6b34-3f59952db766	Loan Payment Central State Bktype	Auto & Transport
411	32277	2018-01-17 23:59:59.000	TRN-986bcce6-3265-3cbe-6b34-3f59952db766	Auto-Owners (Insurance)	Auto Insurance

PFMTransactionClassifications (cont'd)

categorization_id	pfm_account_id	post_ date	host_tran_ number	cleaned_description	classification_desc
368	32303	2018-02-05 07:00:00.000	TRN-986bcce6-3265-3cbe-6b34-3f59952db766	GM Financial Lease	Auto Payment
369	32310	2018-01-31 07:00:00.000	TRN-ba5c18ee-d2d8-ce99-196a-9ab13be49fa5	ExxonMobil	Gas

Suggested storage strategy

Note: We no longer send changes to classifications.

Suggested storage strategy

Element	Description
host_tran_number	Primary key for this extract. The classification_description column may be changed by the user.
cleaned_description	Result of MX cleaning the original description.
classification_description	MX classification of the transaction. This column may be changed by the user.

PhoneNumber

PhoneNumber

phone_id	user_id	customer_id	area_code	phone_number	extension	phone_type
12116	1	1324	512	5551234	7	Business
12117		4264	509	9895632		Home
12120	5060		509	9784621		Mobile

Note: If the user_id is null, the phone number is at the Customer level. If the customer_id is null, the phone number is at the User level.

Suggested storage strategy

- Replace with latest extract from each day.
- Use phone_id as the primary key.

Typical values

- Business
- Car
- Fax

- Home
- Mobile
- Pager
- TDD
- Other

ProductIDs

ProductIDs

product_id	product_name	host_product_code	product_type_id	product_type_name	host_product_type_code
1	Money Market	SDMM	36	Money Market	checking
2	Share Draft	SDPH	8	Checking	checking
3	Forward Checking	ECHK	10	Checking	checking

Suggested storage strategy

- Replace with latest extract from each day.
- Use product_id as the primary key.

Recipient

Recipient

recipient_id	display_ name	wire_ name	customer_ id	email_ address	is_ international	ach_class_ code	ach_ name
15673	SW Properties, Inc DBA Del Mar Esc	Del Mar Escrow	557		0	PPD	
15667	Carter Fred		571		0	PPD	
15668	Abe Ramirez		473	edna21@email.com	0	PPD	Abe Ramirez

Additional data

identification_ number	address_1	address_2	address_3	city	state	postal_code	iso_code_a3
	8577 Haven Ave. Suite 310			Rancho Cucamonga	CA	91730	USA

ABEAVI

Suggested storage strategy

- Replace with latest extract from each day.

RecipientAccount

RecipientAccount

account_id	recipient_id	description	aba	recipient_account_number
153524	15673	Checking	111111111	999888777
153468	15667	Checking	122000000	49076877
153535	15668	Savings	123123123	4463510

Suggested storage strategy

- Replace with latest extract from each day.

RecipientFI

RecipientFI

recipient_fidetail_id	account_id	name	bic	branch_bic	address_1	address_2
100	1498	Totally Real Credit Union	111111111		P.O. Box 123	

RecipientFI (cont'd)

recipient_fidetail_id	account_id	name	bic	branch_bic	address_1	address_2
276	4307	ASB Bank	122000000		P.O. Box 123	Queenstown Central Otago 9300
280	2507	The Cole Law Firm	123123123		800 Washington Ave North, Ste 620	

Additional data

address_3	city	state	postal_code	iso_code_a3	intermediary_aba	is_intermed_fi	i_ban	receiving_fi_short_name	receiving_fi_aba
	Austin	TX	78757	USA		0			
09300 Queenstown	Queenstown		09300	USA		0			
	Minneapolis	MN	55401	USA	091001324	1			

Suggested storage strategy

- Replace with latest extract from each day.

RecurringTransactions

RecurringTransactions

recurring_transaction_id	transaction_type	every_x_weeks_or_months	frequency_bit_flag	start_date	end_date	end_date	executed_occurrences	last_occurrence	replaces_recurring_transaction_id	replaced_by_recurring_transaction_id	recurrence_english_translation
24102	0	2	2	5/27/22 12:00 AM	1/1/22 12:00 AM	1/2/22 12:00 AM	0				Every 2nd week on Monday
24103	1	1	256	6/9/22 12:00 AM	1/1/22 12:00 AM	1/2/22 12:00 AM	1	6/9/22 12:00 AM			Every month on the 9th of the month
24104	1	3	32768	5/16/22 12:00 AM	1/1/22 12:00 AM	1/2/22 12:00 AM	1	5/16/22 12:00 AM			Every 3rd month on the 16th of the month
24105	0	1	1	5/16/22 12:00 AM	1/1/22 12:00 AM	1/2/22 12:00 AM	1	5/22/22 12:00 AM			Every week on Sunday

Suggested storage strategy

- Replace with latest extract from each day.
- Use recurring_transaction_id as the primary key.

RemoteDepositActivity

RemoteDepositActivity

user_id	deposit_date	transaction_id	host_account_id	txn_amount
186175	2017-07-14 00:01:11.700	4097703	3194909	20.7500
248797	2017-07-14 00:12:52.253	3966504	3983900	1578.7900
323191	2017-07-14 00:19:49.203	4064465	3335947	199.2300

Suggested storage strategy

- Add new data daily to destination store.
- Use transaction_id as primary key.

> **Note:** This transaction_id is not the same as the transaction_id from the GeneratedTransactionActivity file. A remote deposit is not considered a generated transaction.

Subsidiary

Subsidiary

subsidiary_id	customer_id	created_by_user_logon_id	display_name	ach_name	ach_tax_id
11	709	8776	HCS Renewable Energy, LLC	HCS Renewable En	81-3275120
12	713	8841	Rabb Children LLC	Rabb Children	126-2602331
13	905	4064465	Sulfide Systems, LLC	Sulfide Systems	47-3896736

Additional data

wire_name	street_address_1	street_address_2	city	state	postal_code	province	iso_code_a3	is_international
HCS Renewable Energy	501 S Austin Ave, Ste 127		Georgetown	TX	78626		USA	0
Sulfide Systems, LLC	9946 Goodwood Blvd		Baton Rouge	LA	70815-4518		USA	0

Suggested storage strategy

- Replace with latest extract from each day.

> **Note:** You must have UUX version 4.2.4.5.00 or later to receive the Subsidiary file.

TemplatePayments

TemplatePayments

template_payment_id	template_id	recipient_id	account_id	amount	currency_name
29756	13079	9573	9434	240.00	U.S. Dollar
29757	13079	9563	9424	266.16	U.S. Dollar
29758	13079	9663	9524	711.77	U.S. Dollar

Additional data

split_amount1	split_account_id1	split_amount2	split_account_id2	addenda	template_recipient_id
					29756

Additional data (cont'd)

split_amount1	split_account_id1	split_amount2	split_account_id2	addenda	template_recipient_id
					29757
					29758

Suggested storage strategy

- Replace with latest extract from each day.

Templates

Templates

template_id	type_description	name	description	customer_id	create_date	create_by_user_id
518	Payroll	Weekly Payroll	Weekly Payroll	543350	2018-11-19 09:28:55.430	543352
75011	ACH Payments	Tire Technologies		399668	2018-11-26 10:22:04.003	399668
75006	Wire Transfer	Transone Logics		301901	2018-11-21 14:08:03.983	301909

Additional data

last_edit_date	last_edited_by_user_id	is_single_payment	ach_class_code	user_id
2018-11-19 09:28:55.430	543350	1	PPD	545727
2018-11-26 10:23:19.740	399668	1		378209
		1	PPD	281539

Suggested storage strategy

- The user_id and template_id form the primary key.
- Replace with latest extract from each day.

ThirdPartyData

ThirdPartyData

data_id	user_id	vendor_name	data_type	data_value
1	7737	BillPayment.IPayJXchangeVariables	Session.UserName	19682411

ThirdPartyData (cont'd)

data_id	user_id	vendor_name	data_type	data_value
4	7737	BillPayment.IPayJXchangeVariables	Session.Message	<bpAccounts UserUnenrolled="false"><UserData Value="19682411" /><AccountData BpID="4804295" Value="1036820" AcctId="1036820" HostAcctId="36538" /></bpAccounts>
14	3461	Q2Wedge.RDCEnrollmentRequestForm	RequestedWhen	2017-05-25T13:50:53
15	3461	Q2Wedge.RDCEnrollmentRequestForm	RequestedByLoginID	12345

Suggested storage strategy

- Replace with latest extract from each day.
- The user_id, data_id, and vendor_name form the primary key.

UnProcessedTransactions

UnProcessedTransactions

transaction_id	user_id	transaction_amount	gt_type	create_date	gt_description	authorized_user_id	authorized_date	originating_account_id	subsidiary_id
59040	8371	157.00	FundsTransfer	2021-06-01 8:00:00.000	Funds Transfer via Mobile	83715	2021-06-01 8:00:00.000	8884	NULL
58904	7766	100.00	FundsTransfer	2021-06-01 2:46:00.050		77660	2021-06-01 2:46:00.050	36982	NULL
59034	10227	41.00	FundsTransfer	2021-06-01 7:52:00.000	Funds Transfer via Mobile	102275	2021-06-01 7:52:00.000	76203	NULL
59259	7799	500.00	FundsTransfer	2021-06-01 9:58:00.050	Funds Transfer via Online			14046	NULL

Additional data

is_external	process_date	recurring_ master	parent_id	is_child	ui_source_ id	channel_ description	template_id	gt_status	host_result
0	2021-06-01 12:00:00.000	1	NULL	0	1	OnlineBanking	NULL	Authorized	Csr action required.
0	2021-07-01 12:00:00.050	0	NULL	0	8	API	NULL	Cancelled	HostFailed
0	2021-06-01 12:00:00.050	0	NULL	0	1	OnlineBanking	NULL	HostFailed	Waiting on connectionstring.
0	2021-06-01 12:00:00.500	0	NULL	0	1	OnlineBanking	NULL	Drafted	No matching adapter for specified UISource.

Suggested storage strategy

- Update the destination store with new rows and changes.

> **Note:** This extract contains any transactions that are unprocessed 60 days before the day of extraction. Unprocessed transactions that are older than 60 days and transactions that are processed are no longer included in the next day's extract.

UserAccountData

UserAccountData

user_id	host_account_id	product_name	product_id	estatement_registration_date	access	account_number_internal
16108	5165	Free Checking	3	2015-11-17 12:00:06.077	7	825108679841
28527	5465	Business Checking	7	2015-11-17 12:00:06.0772		825109268051
20649	8365	Business Money Market Account	14		1	565528758128

Additional data

account_number_external	cif_internal	cif_external	is_external_account	external_account_aba	skip_balance_check
4147769613	137142	61708830	0		0
4037699128	199688	44541297	0		0
4037668054	195130	64772714	0		1

Suggested storage strategy

- The user_id, host_account_id, and access form the primary key.
- Replace with latest extract from each day.

The access column indicates the level of access a user has to an account.

> **Note:** UserAccountData only includes accounts marked “open” or “dormant” in the application and accounts of non-deleted users. If a user is deleted, their account will no longer appear after 30 days.

Typical values

- 1 – Deposit Only
- 2 – View Only
- 3 – Deposit and View
- 4 – Withdraw Only
- 5 – Withdraw and Deposit
- 6 – Withdraw and View
- 7 – View, Withdraw, and Deposit

> **Note:** If e-statements are serviced through a third party, the estatement_registration_date is null.

UserAccountNickName

UserAccountNickName

nickname_id	host_account_id	user_id	account_nickname
7684	14815	21870	LaRocca
7685	14815	26692	LaRocca Inspections
7690	14817	15846	
7743	14957	14210	JON E JONES 2007 IRREV TRUST

Suggested storage strategy

- Replace with latest extract from each day.

> **Note:** Each user that has access to an account may use a unique display name/nickname.

UserAdmin

UserAdmin

user_id	customer_id	user_ role_id	role_ description	full_description	role_ deleted_ date	enabled	manage_ user_roles
15235	6404	49	Treasury Clerk			1	1
24909	17376	150	Company Admin	Admin has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights.The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity		1	1
75369	37467	31043	View Only	Has no access to features, access to all accounts, and access to view all GT trx types.		1	0
75313	50632	31028	Admin			1	1

Suggested storage strategy

- Replace with latest extract from each day.

> **Note:** Only users that are non-deleted or deleted within the last 30 days of extaction will be included.

UserData

UserData

user_id	customer_id	user_ role_ id	group_id	active_ inactive	created_date	deleted_date	group_ name	group_ deleted_ dates	zone_id	zone_ description	auto_ generated
1	1		1	Active	2015-11-16 11:00:05.000		Test_ Group		1	Academy Credit Union	1
2	1		1	Disabled	2015-11-16 11:00:23.120	2016-10-03 15:09:25.480	Test_ Group		2	Highland Credit	1
3	1		1	Inactive	2015-11-16 11:00:54.777		Test_ Group		1	Academy Credit Union	1

Suggested storage strategy

- Use the next day's extract to update the data store because the active_inactive and deleted_date columns may change values from day to day.
- The deleted_date column may contain null values.

> **Note:** The active_inactive and deleted_date columns are independent of each other. The active_inactive column is the user status. It will change to Inactive if a user has not logged in for a specific number of days, but this doesn't delete the user. Similarly, the status of a user does not change upon deletion. The deletion date is just added to the deleted_date field.

Typical values for active_inactive

- Active
- Disabled
- Inactive

> **Note:** If zones are not installed, the zone_id and zone_description are null.

UserDataPII

UserDataPII

user_id	primary_cif	last_name	first_name	middle_name	salutation	suffix	social_security_number	email_address	street_address_1
1	340781	Smith	John	Michael	Mr.		111111111	john.smith@email.com	123 Elm Street
2	130207	Smith	Jane	Ann	Mrs.		111111112	jane.smith@email.com	P.O. Box 259
3	140352	Jones	John	Jay	Mr.	Jr.	000000000	john.jones@email.com	450 Hwy 3

Additional data

street_address_2	city	state	postal_code	province	is_international	iso_code_a3
	Houston	TX	77020		0	USA
341 Olive Drive	Houston	TX	77020		0	USA
	Rock Creek		V0H1y0	BC	1	CA

Suggested storage strategy

- Replace with latest extract from each day.
- Only users who have not been deleted within the last 30 days will be sent.

UserEnabledAlerts

UserEnabledAlerts

alert_definition_id	host_account_id	alert_type	notification_type	operand	comparison_value	one_time_alert	user_id	sub_type_description	send_secure_message	last_alerted	email	phone_number
891	47300	Online activity alerts	Email	GT		0	17669	Funds Transfer			johnsmith@email.com	
1244	21877	Account amount-driven alerts	Sms	LT	2,000.00	1	13730	Available Balance	1	2019-10-03 13:41:03.650		5558333507
1598	10487	NSF transaction alerts	Sms	EQ	0	0	4435		1			5553778867

Suggested storage strategy

- Replace with latest extract from each day.
- Use alert_definition_id as the primary key.

Typical values for operand

- GT – greater than
- LT – less than
- EQ – equal

UserEnrollment

UserEnrollment

data_id	user_id	enrollment_description	enrollment_date
2	163615	Q2_Apple_Watch	2020-04-29 07:08:08.843
5	178525	Q2_Apple_Watch	2020-04-29 11:51:22.930
1	82749	Q2_Apple_Watch	2020-04-29 03:16:06.187

Suggested storage strategy

- Add new data daily to destination store.
- Use a composite key of data_id and user_id.

Note: EVE only includes enrollment data for users with Apple Watch devices. This file will be empty if your users do not access digital banking through an Apple Watch.

UserLevelGTEntitlements

UserLevelGTEntitlements

group_id	customer_id	user_id	enabled	property_id	property_name
10	10	10	0	55	GeneratedTransaction/AchBatch
10	10	10	0	56	GeneratedTransaction/AchBatch/Authorize
11	11	174	1	55	GeneratedTransaction/AchBatch
11	11	174	1	56	GeneratedTransaction/AchBatch/Authorize

Suggested storage strategy

- Replace with latest extract from each day.
- Use a composite key of user_id and property_id.

UserLogon

UserLogon

user_ logon_id	user_id	login_name	last_change	last_logon	last_ failed	create_date	password_ status	status_reason	logon_ deleted_date
8295	7939	bobsmith	2018-03-29 08:26:35.377	2018-03-29 12:51:17.517	2018-03-29 12:56:32.423	2018-03-06 08:42:01.900	Temporary Access Code Required	TemporaryAccessCode requested	
300004	309235	jasonwhite	2018-08-14 15:23:55.550			2018-06-14 13:23:41.000	Password Change Required	Csr Initiated Change	2021-07-20 00:00:03.193

Suggested storage strategy

- Replace with latest extract from each day.

Typical values

- CSR Initiated Change
- Disabled at user request (TAC)
- Expired Password
- Expired Password

- Login disabled
- Login Disabled
- Login Locked Out
- New API User
- New password has expired
- New Password has expired
- Normal
- Password change required
- Password Change Required
- Password was enabled
- Password was unlocked
- Temporary Access Code Required
- TemporaryAccessCode requested
- Token Required
- User disabled
- User locked out

UserThemes

UserThemes

user_id	uux_theme	theme_description	language_id	language
454502	q2-spanish	spanish theme	2	Spanish
454626	q2	Default-q2	1	USEnglish
751	largefont	large font uux theme	1	USEnglish
4202	underwater	underwater uux theme	1	USEnglish

Suggested storage strategy

- Replace with latest extract from each day.