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Manage your Contact Center in Agent Setup

Bulk import

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- Administrator

Learn how to import multiple agents or contacts using Agent Setup's Bulk Import feature.

Related documentation:

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About bulk import

Important

Some features described here may not apply to your organization's setup. If you need features that aren't available to you, contact your administrator or Genesys representative.

As you set up and maintain your call center, you may sometimes need to input a large amount of data into the system. Using Agent Setup, you can import agent accounts and customer contact records in bulk, making the process smoother and more reliable.

To create, modify, or delete large numbers of agents/agent groups, upload a comma-separated value (CSV) file containing new and changed agent information. Create/modify values in the appropriate columns for the agent. When you import the CSV file into Agent Setup, the agents listed in the file are created, modified, or deleted, based on the action to be taken as indicated in the Action column.

Important

You can also use a .xls file for Import. But, the content structure of the .xls file should be in CSV format.

About CSV files

Important

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- The .csv file must be a text file in a comma-separated format.
 - The first line of the .csv file must contain user properties, and each line thereafter must represent a separate user.

When you import a .csv file, each parameter value is updated according to the following rules:

- If a value is present, the new value replaces the previous value.
- If an empty value is encountered, no change is made.
- If the value includes /d , the attribute is deleted.
- If no corresponding record is found, an error message is logged and the update continues to process.

How do I import a file?

[Link to video](#) To import a .csv/.xls file:

1. Go to **Data Tools > Bulk Import** in the Agent Setup application menu.
2. Click the icon in the **Source File** field and, using the file browser, select your CSV file.
3. Optional. Select a template from the Template drop-down list, if you have already defined the template. See Templates section on creating templates.
4. Check the **Validate** checkbox if you want to ensure that the CSV file is structured correctly.
5. Click **Import**.
6. Go to **Users** tab to verify if all the agents are imported.

Important

The CSV file is validated for the structure, data type, and availability of mandatory fields. If any errors are thrown during validation, open your CSV file and fix the errors and import again.

How do I stop an import?

The image shows two screenshots from a software interface. The top screenshot is titled "Bulk Import" and contains the following elements: a subtitle "Import a large number of objects at one time by uploading csv or xls file.", a "Source File" field with the text "users 2022-03-24 at 11-26-56 AM.csv" and a file icon, a "Template" dropdown menu set to "No Template", a checked checkbox labeled "Validate before importing", a "Validate" button, and an "Import" button. Below these is a progress bar showing "11%" completion. A status message reads: "Validating 'users 2022-03-24 at 11-26-56 AM.csv'. Last processed Username is test8." A red circle highlights a small square button with a red 'x' icon on the progress bar. The bottom screenshot is a modal dialog titled "Stop Import" with the question "Are you sure you wish to stop the import process?". It contains a "Cancel" button and a "Stop" button. A red circle highlights the "Stop" button. A curved arrow points from the red 'x' button in the top screenshot to the "Stop" button in the bottom screenshot.

Bulk Import

Import a large number of objects at one time by uploading csv or xls file.

Source File users 2022-03-24 at 11-26-56 AM.csv

Template No Template

☒ Validate before importing

Validate Import


11%

Validating 'users 2022-03-24 at 11-26-56 AM.csv'. Last processed Username is test8.

Stop Import

Are you sure you wish to stop the import process?

Cancel Stop

When you stop an import, a window asks you to confirm that you really want to stop the import. After you click **Stop**, agent records that were imported before you clicked  are retained and the import process does not proceed. By clicking **Stop**, you are not cancelling the entire import.

Import agent accounts

By importing a large number of agent accounts at one time, you won't need to add the accounts one at a time and you can apply a template to configure options, such as DN, place, person, and log in options, to all accounts.

CSV file parameters

Property	Type	Mandatory?	Action	Description
Username	String	Yes	ADD, UPDATE, DELETE	The unique username of the agent or user.
First Name	String	Yes	ADD, * needed for UPDATE if First Name change	The first name of the agent or user.
Last Name	String	Yes	ADD, * needed for UPDATE if Last Name change	The last name of the agent or user.
Email	String	No		The agent or user's email address.
Extension	String	No	/d to unassign and delete /r to unassign only	The extension #1 of the agent. A place is also created if the extension is specified.
Extension2	String	No	/d to unassign and delete /r to unassign only	The extension #2 of the agent. A place is also created if the extension is specified.
Extension3	String	No	/d to unassign and delete /r to unassign only	The extension #3 of the agent. A place is also created if the extension is specified.
Folder	String	No		The folder path to root folder (Persons) where new agent or user is created. For example, Company/Department/Team.
Place Name	String	No	/d to unassign and delete /r to unassign only	The place name #1 of the agent. The place name "Extension" is used if not specified.
Place Name2	String	No	/d to unassign and delete /r to unassign only	The place name #2 of the agent. The place name "Extension2" is used if not

Property	Type	Mandatory?	Action	Description
				specified.
Place Name3	String	No	/d to unassign and delete /r to unassign only	The place name #3 of the agent. The place name "Extension3" is used if not specified.
Default Place	String	No		The name of the Default Place.
Person DBID	Numeric	No	UPDATE, DELETE	Person Database Identifier. Used as the primary key when utilizing Bulk Import to update a username or export users.
Employee ID	String	Yes	ADD	The employee identifier of the agent.
Change Password	Boolean	No		Specifies that the user will be prompted to change the password on their next log in.
Enabled	Boolean	No		Y specifies that the agent account is enabled. N specifies that the agent account is disabled.
Is Agent	Boolean	Yes	ADD	<ul style="list-style-type: none"> Specifies that this user is an agent. If this field is set to a Y but the Is Supervisor field is not, only the Agent Login, DN, and Places for the agent are created. If the Is Supervisor field is set to a Y, additional supervisor features and permissions are enabled.

Property	Type	Mandatory?	Action	Description
				<ul style="list-style-type: none"> If the user is an administrator, this field is not required.
External ID	String	No		Any external ID used to identify the user.
Login ID	String	No		The user's login ID.
Is Supervisor	Boolean	No		Y specifies that this user is a supervisor. If this is the case, the Is Agent field must be set to Y. At that point, all required desktop logins and features are enabled, along with the required supervisor features and permissions.
Is Admin	Boolean	No		Y specifies that this user is an administrator. If this is the case, the Is Agent field (and Is Supervisor field) is not required.
Wrap Up Time	Numeric	No		The number of seconds an agent remains in ACW after call is disconnected. This field applies only to voice calls.
VoiceMail.MailBox	String	No		<p>If specified, populate the following option to the Annex of all associated Agent log ins:</p> <p>AgentLoginAnnex:TServer/gvm_mailbox. Valid values: numerical (12345)</p>
Recording.Hierarchy	String	No		If specified, populate the following option to

Property	Type	Mandatory?	Action	Description
				the Agent's Annex:[recording] agent_hierarchy.
SIP Phone Type	String	No		The type of SIP phone the agent is using as a softphone.
Skill:	Numeric	No		The number that identifies the agent's skill level for the specified skill.
Switch:	Boolean	No		Y means that a DN and Agent Login are created for the agent on the specified switch.
AgentG:	Boolean	No		Y means that the agent is added to the specified agent group.
Annex	String	No		<p>Any custom Annex value. For example, column name Annex:htcc/roles with a value of Agent.</p> <div> <p>Important</p> <p>The Annex property column in the .csv file is specified as Annex:, if the Annex value remains empty Annex is written as Annex: .</p> </div>
Action	String	No		<p>ADD adds a new agent.</p> <p>UPDATE updates an existing agent.</p> <p>DELETE removes an existing agent.</p>

CSV file example

First Name,Last Name,Employee Id,Username,Is Agent,Is Supervisor,Is Admin,External Id,Login ID,Extension,Skill:English,Switch: San Fran,Switch: London,AgentG:Good,AccessG: Super,Annex,Action,Folder,Wrap Up Time,Enabled

```
Sarah, Lee, 223344, sarahl@acme.com, N, Y, Y, ADD, Acme/Branch/Team 1, 60  
John, Doyle, 223465, johnd@acme.com, Y, N, N, 2233, 1, Y, N, ADD, Acme/Branch/Team 2, 0  
Robert, Cook, 244456, bobb@acme.com, Y, Y, Y, johnd@acme.com, 5, Y, Y, ADD, Acme/Branch/Team  
3, 60, Y
```

Important

Bulk imports do **not** include the **Password** field in the imported file. A default password is associated to each user account in the imported file. The format of the default password is: --, where is the three-digit abbreviation for the month. For example, hjackson-Feb-2017. The **Reset Password** option is automatically enabled when adding or importing new users, so all users are prompted to reset their password the next time that they log in.

Import multiple contacts

By importing contact records with Bulk Import, you can avoid having agents add contacts manually.

Important

After importing customer contact records, you must log into Agent Workspace and use Contact Directory to view the imported records.

Tip

All properties should be included in the CSV file in the order presented below and all properties are mandatory with only one exception—when using the DELETE action, the phone number property of the CSV file can be left blank.

CSV file parameters

Property	Type	Mandatory?	Action	Description
Action	String	Yes	ADD or A UPDATE or CHANGE or C DELETE or D The default value is ADD and the values are case-insensitive.	ADD adds a new contact. UPDATE updates an existing contact. DELETE removes an existing contact.
First Name	String	Yes	ADD, * needed for UPDATE if First	The first name of the contact.

Property	Type	Mandatory?	Action	Description
			Name change	
Last Name	String	Yes	ADD, * needed for UPDATE if Last Name change	The last name of the contact.
Phone Number	String	Yes		The contact's phone number.

Important

- Contacts are identified by combination of First Name and Last Name fields for DELETE and UPDATE actions.
- UPDATE action replaces the first Phone Number attribute value of a contact.
- ADD action checks if there is an existing contact with the same FirstName, LastName, and PhoneNumber attributes. If it exist, the new contact will not be created.

Import Agent Groups

You can also import a large number of agent groups at one time. Use the following parameters in the CSV file.

Property	Type	Mandatory?	Action	Description
Agent Group Name	String	Yes	ADD, UPDATE, DELETE	The unique name of the Agent Group.
Folder	String	No	ADD, UPDATE	Folder of the Agent Group (by default it will be tenant/Root).
Skill Expression	String	No	ADD, UPDATE	Specify which agents will belong to virtual Agent Group, using expression. It also specifies if the Agent Group is virtual or not.
Caller ID	String	No	ADD, UPDATE, DELETE	Specifies the Caller ID attribute that is assigned to the Agent Group.
Annex	Annex:	No	ADD, UPDATE,	Any value from

Property	Type	Mandatory?	Action	Description
			DELETE	Annex of Agent Group user would like add/update/delete.
Origination DN	Origination DN:	No	ADD, UPDATE, DELETE	Specifies the list of DNs from which calls can be routed or diverted.
Agent Group Action	Enum	Yes	-	ADD adds a new Agent Group. UPDATE updates an existing Agent Group. DELETE removes an existing Agent Group.