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Genesys Administrator Extension Help

[Bulk Change Sets](#)

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Bulk Change Sets

Genesys Administrator Extension allows you to perform bulk changes to users. For example, you can create a Bulk Change Set to add or remove multiple users from your system in one action, or to add or remove multiple skills, or both.

Starting in release 8.5.250, the Bulk Change Sets feature is not available in GAX by default. Instead, Genesys recommends that you use the other Bulk Provisioning features for **User (Person)** objects, including Agents, and **Agent Group** objects. However, if you still want to use Bulk Change Sets, enable it by setting **enable_bulk_change_sets=true** in the **[general]** section of the **Options** tab of the GAX Application object. It will appear in the **Administration** menu.

Display Options

The **Bulk Change Sets** panel lists all the Bulk Change Sets in your environment that either have not been executed yet or have failed during execution. To see a list of successful Bulk Change Sets, see the **Completed Bulk Changes** panel.

Configuration Object Management respects tenancy permission settings. You can access only those objects that you have been granted permission to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the **Quick Filter** field.
- Click the **Tenant Filter** button to open the **Tenant filter** panel. In this panel, click the check box beside each tenants that you want to select. Use the **Quick Filter** field in this panel to filter the tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order.

Details

The **Bulk Change Sets** list displays the following information:

- **Change Set Name**—The name of the Bulk Change Set.
- **Creator**—The name of the user that created the Bulk Change Set.
- **Creation Date**—The date on which the Bulk Change Set was created.
- **Last Modified Date**—The date on which the Bulk Change Set was last modified.
- **Change Set Status**—This can be one of the following:
 - **Empty**—No data has yet been entered in the Bulk Change Set.
 - **Incomplete**—Only partial data has been entered in the Bulk Change Set.
 - **Ready to Execute**—The Bulk Change Set is ready to be executed.

- **Execution**—This can be one of the following:
 - **Not Executed**—The Bulk Change Set has not been executed yet.
 - **Completed**—The Bulk Change Set has been executed.
 - **Failed**—The execution of the Bulk Change Set failed.
- **Progress**—During execution, this field displays a progress bar for the Bulk Change Set.
- **Executed by Tenant**—Indicates which tenant last executed the Bulk Change Set.
- **Executed by User**—Indicates which user last executed the Bulk Change Set.
- **Previously Executed Date**—Indicates the date and time at which the Bulk Change Set was last executed.

Click a Bulk Change Set in the list to view more information about the item. The following fields are displayed:

- **Change Set Name**—The name of the Bulk Change Set
- **Deletions**—The objects that will be deleted by the Bulk Change Set
- **Additions**—The objects that will be added by the Bulk Change Set
- **Updates**—The objects that will be updated by the Bulk Change Set

Important

A **Solution Definition file** is created when a Bulk Change Set is executed. See the **Completed Bulk Changes** panel for instructions on how to download the Solution Definition file.

Procedures

You can perform the following actions from the **Bulk Change Set** panels:

Creating Bulk Change Sets

To create a Bulk Change Set, do the following:

[+] Show steps

1. In the **Bulk Change Sets** panel, click +.
2. Enter information in the following fields:
 - **Change Set Name**—The name of the Bulk Change Set.

Important

The **Change Set Name** field must be unique in the environment.

- **Deletions**—Enter any Configuration Object that is to be deleted with the Bulk Change Set. If there are deletions, perform the following actions. Otherwise, move on to the next step.
 - a. Click **Add**. The **New Deletion Item** panel appears to the right.
 - b. Click **Browse**. A list of Configuration Objects appears to the right.
 - c. Objects that appear in the list are determined by the currently selected category. Click the drop-down menu at the top of the panel to change the category type.
 - d. You can use the **Quick Filter** or **Tenant Filter** field to find specific objects. Click the checkbox beside an object to add the object to the Deletions list.
 - e. The name of the object appears in the **New Deletion Item** panel. Click **OK** to add it to the Deletions list.
 - f. Repeat the steps in this list to add more objects to the Deletions list.
- **Additions**—Enter any Configuration Object that is to be added with the Bulk Change Set. If there are additions, perform the following actions. Otherwise, move on to the next step.
 - a. Click **Add**. A new panel appears to the right.
 - b. Click **Browse**. A list of Configuration Objects appears to the right.
 - c. Select an object type in the **Type** drop-down menu.
 - d. Click **Browse** to select an object to use as a template. A panel opens to the right. Click the checkbox beside an object to select it.

Important

When an object is used as a template, all aspects of the template object are used for the Addition objects, including connections and permissions.

- e. Click **Next**.
- f. In the **Number to Create** field, enter the number of objects to create with the template. The value must be an integer between 1 and 100.
- g. In the **CSV File** field, perform the following actions:
 - Click **Choose File** to select a CSV file from which to acquire the new data.
 - In the window that opens, navigate to the location in which the CSV file is stored. Select the CSV file to use.

Important

The following is an example of an acceptable CSV file format for creating User (Person) objects.

Only the **employeeid** and **username** fields are mandatory. All other fields are optional and can be omitted, in which case GAX provides default values that are copied from the template object.

employeeid, folderid, tenantdbid, state, lastname, firstname, password, username, skilllevels

bulkuser1,105,1, CFGEnabled, Tamblyn, Ericm, password, bulkuser1, "{skilldbid:102, level:10},{skilldbid:106, level:6}"

bulkuser2,106,2, CFGEnabled, Tamblyn, Ericm, password, bulkuser1, "{skilldbid:102, level:10},{skilldbid:107, level:7}"

- Click **Open**.
- h. Click **Finish**.
- **Updates**—Enter any update that is to be performed on Configuration Objects with the Bulk Change Set. If there are updates, perform the following actions. Otherwise, move on to the next step.
 - a. Click **Add**. The **New Update Item** panel appears to the right.
 - b. Click **Browse**. A list of Configuration Objects appears to the right.
 - c. Objects that appear in the list are determined by the currently selected category. Click the drop-down menu at the top of the panel to change the category type.
 - d. You can use the **Quick Filter** or **Tenant Filter** field to find specific objects. Click the check box beside an object to add it to the Updates list.
 - e. The name of the object appears in the **New Update Item** panel. Click **OK** to add it to the Update list.
 - f. Repeat the steps in this list to add more objects to the Update list.
- 3. In the Bulk Change Set creation panel, you can reorder the objects within the **Deletions**, **Additions**, or **Updates** lists.

Important

Bulk Change Set actions are executed in the following order : Deletions, Additions, and then Updates.

4. Click **Save** to save the Bulk Change Set.

Important

This action does not execute the Bulk Change Set. To execute the Bulk Change set, follow the instructions for [executing a Bulk Change Set](#).

Deleting Bulk Change Sets

To delete a bulk change step, do the following:

[+] Show steps

1. Click the check box beside each Bulk Change Set that is to be deleted.
2. Click **Delete**. A dialog box displays to confirm the action.
3. Click **OK** to continue, or **Cancel** to discard the action.

Executing Bulk Change Sets

To execute a bulk change set, do the following:

[+] Show steps

1. Select a Bulk Change Set in the **Bulk Change Sets** list. A new panel with more information about the Bulk Change Set opens to the right.
2. You can choose to validate the Bulk Change Set before execution. Click **Validate** to ensure that the Bulk Change Set is ready to be executed.

Important

The **Validate** button is useful in determining whether the Bulk Change Set is ready to be executed or whether it is dependent on other Bulk Change Sets to be executed first. For example: Some Additions depend on other objects to be added. You might want to update several Agents with a new Skill. However, the Skill must be created first, before the Agents can be updated. In this scenario, clicking **Validate** will verify that the Skill has been created.

3. Click **Execute** to execute the Bulk Change Set. You can view the status of the Bulk Change Set in the **Completed Bulk Changes** panel.

Important

A **Solution Definition file** is created when a Bulk Change Set is executed. See the **Completed Bulk Changes** panel for instructions on how to download the Solution Definition file.

Completed Bulk Changes

The **Completed Bulk Changes** panel lists the successfully executed bulk changes in your environment.

The **Completed Bulk Changes** list displays the following information:

- **Change Set Name**—The name of the Bulk Change Set

- **Creation Date**—The date on which the Bulk Change Set was created
- **Executed by Tenant**—Indicates which Tenant last executed the Bulk Change Set
- **Executed by User**—Indicates which user last executed the Bulk Change Set
- **Started**—Indicates the date and time at which the execution of the Bulk Change Set was started
- **Ended**—Indicates the date and time at which the execution of the Bulk Change Set was completed

To delete records of Bulk Change Sets, click the check box beside each Bulk Change Set that is to be deleted, and then click **Delete**.

Important

This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

Click a Bulk Change Set in the list to view more information about the item. The following fields are displayed:

- **Change Set Name**—The name of the Bulk Change Set
- **Deletions**—The objects that were deleted by the Bulk Change Set
- **Additions**—The objects that were added by the Bulk Change Set
- **Updates**—The objects that were updated by the Bulk Change Set

Click **Export** to download the solution definition file that was used during execution of the Bulk Change Set.

Click **Delete** to delete the record of the Bulk Change Set.

Important

This action does not delete the Bulk Change Set; it deletes the record of the Bulk Change Set.

Limitations

The Bulk Change Set functionality in GAX does not support the following scenarios:

Bulk Change Set creates new objects that also have circular dependencies

Example:

1. A user creates a Bulk Change Set and adds a new agent and a new skill to the Additions section.

2. The user saves the Bulk Change Set.
3. The user assigns the new skill to the new agent, but also gives the new agent access permissions for the new skill.

This scenario creates circular dependencies between the new objects, and the execution of the Bulk Change Set fails.

Solution:

- Execute the Bulk Change Set before assigning dependencies between objects.

Bulk Change Set references a new object before the Bulk Change Set is saved

Example:

1. A user creates a Bulk Change Set and adds a new agent and a new skill to the Additions section.
2. The user does not save the Bulk Change Set and attempts to assign the new skill to the new agent.
3. The user cannot select the new objects until the Bulk Change Set is saved.

Solution:

- Save the Bulk Change Set before referencing the new object.