GENESYS™

Genesys Administrator Extension Help

Bulk Import/Export of Agent Data

3/15/2025

Contents

Bulk Import/Export of Agent Data

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

The CSV file used to import/export Agent data is the same as that used to import/export Persons (Users) in Configuration Manager. Refer to CSV File for Importing and Exporting for a detailed description of the CSV file.

> ### Important
> Tenant users can update Agents in only the Tenant to which the user belongs.

GAX enables you to create spreadsheet templates for this purpose. You can create an empty template containing only column headers, or you can export data from existing agent records. The exported spreadsheet can be modified and then imported into GAX again to create or update or delete agent records.

> ### Tip
> You might want to create various templates that fit scenarios specific to your operations.

Creating an Empty Template

An empty template contains all of the mandatory columns plus column headers that you specify. It does not include any data—that is for you to fill in.

1. To create a template, click **Create Spreadsheet** in the Agents window or in the History window. This opens a column picker window in which you select the columns that you want to appear in the template.

2. In the column picker window, select the fields that you want included in the template. The selected columns appear in the columns list on the left. Drag the column names or use the arrows to put them in any order that you require. Note the following:

   - The mandatory fields are always included.

   - The Action field is always added as the first column.

   - For Skills, Agent Groups, Access Groups, and Switches, each object can be selected as a column.

> The column header appears as <type>:<name>.

- Virtual Agent Group cannot be imported/exported in bulk, so are not listed in the Agent Groups table.

3. After you have selected and ordered the columns, click **Create Spreadsheet**. GAX generates and downloads the template file, called **download.csv**.

Exporting Data

GAX allows you to export data from existing data records. If you are modifying the spreadsheet to use as a template, save it as a CSV after making the appropriate changes, and upload it into GAX.

Exporting Agent Data From GAX into a CSV File

1. In the Agents list, select those Agents for whom you want to export data.

2. Click **Export**.

3. The column picker window has the associated fields pre-selected for the selected agent. For example, the associated Agent Groups, Access Groups, Skills, and Switches, will be pre-selected for those Agents that the user has selected before. Select more fields as required, or clear those fields that you do not want exported.

4. Click **Export**. GAX generates and downloads a spreadsheet called **download.csv** with the data that you selected for export.

Uploading a File

Before uploading the bulk updates, you must enter the data into a spreadsheet and save it as a CSV file. Do this in one of two ways:

- Create an empty template and fill in the appropriate values—This is probably the best way if the majority of your updates are adding new agents.

- Export existing data and make the necessary additions and changes—This is probably the best way if you are primarily making changes to existing agents. You can export the information for just those agents, saving you from filling in the mandatory information for them.

See the example of a prepared spreadsheet and CSV file here.

Now go ahead and upload the data into GAX.

1. Click **Import** in either the Agents window or in the History window.

2. Click **Select File** and, using the file browser, select your CSV file.

3. Click **Upload Spreadsheet**. GAX starts validating the file, and displays its progress. You can either click **Close** to close the window, or you can monitor the progress from here. Even if the window is closed,

processing will continue and can be monitored in the History window.

- If the **Spreadsheet is Valid**, click **Continue** to start the upload.

- If the dialog box displays one or more errors, open your file in a new window and fix the errors. Then repeat this process starting at step 2.

4. GAX starts processing the records and displays the progress. If necessary, you can do either of the following at any time:

- Click **Close Window**. Processing will continue, and can be monitored in the History window.

- Click **STOP Operation**, then click **Yes, STOP Operation** to confirm. When processing stops, you are returned to the Agent List view.

5. If you did not stop the upload, GAX displays **Operation Completed** when the processing of records is finished. It also displays a summary of results, namely the number of records that were successfully created and/or updated, and the number of records that were not updated or created because of an error. Click **Close Window** to go back to the main Agent list.

Script Actions

For new users:

1. Create a new Person with specified properties in the specified Folder.

2. Associate the new Person with the specified Access Groups.

3. Associated the new Person with the specified Agent Groups.

4. For Agents, add the specified Skills.

5. For Agents, do the following:

- If the Extension field is not specified, create and associate Agent Logins on all specified Switches with the Login Code equal to the Username of the Agent. Agent Logins are created in the Switch Agent Logins folder of the same folder hierarchy specified for the Person object in the Folder property.

- If the Extension field is specified, a new Place is created with the name equal to the Username of the Agent. Extension DNs are created with the number corresponding to the Extension field on all specified Switches. Agent Logins are created and associated with all specified Switches that have a Login Code equal to the value of the Extension field. All objects are created under their corresponding root folders using the same folder hierarchy as specified for the Person object in the Folder property.

For existing users:

1. Username and Is Agent fields must be populated in the input file identify the Person.

2. All other fields are optional.

3. If an optional field is defined, its value is compared to the existing value and, if different, updated for that Person.