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Genesys Skills Management Automated Install and Upgrade Guide

Configuring a CSV File as Data Source

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You can also configure a CSV file as a data source for importing OrgData. Follow the steps below to configure a CSV file as a data source.

1. Navigate to **Admin > Users > OrgData Setup**.
2. On the **Define Data Sources** page, in **File Data Sources Configuration** section, select the check box **Use File based sources of Organisational Data**.

3. Click **+ ADD FILE** to define a new file source.
4. Enter the CSV file related values in the following fields:
 - **Filename** – enter the name of the file to be imported along with its extension. For example, OrgdataCSV.csv
 - **Number of Columns** – this field will be automatically updated based on the source file configuration.
 - **Number of Non Data Header Rows** – enter the number of rows that are not part of the data rows. Most often, these rows are at the beginning of the file and used as an header or to explain any important information.
 - **Delimiter** – select the delimiter that must be used to separate the data values.
5. Click **+ ADD Column** to define each data column within the file.
6. Enter the column values in the following fields:
 - **Source ID** – enter the column number for a specific field within the file.
 - **Name** – enter an user friendly name for the column.
7. Repeat steps 5 and 6 until you add all columns in the file.

Important

During the file import and processing, the **Number of Columns** value is used to validate the file. Hence, Genesys recommends to configure all the columns from CSV file in PDNA even though they might not be used.

8. Click **SAVE AND MAP FIELDS**.

Mapping CSV Data Source to User Fields

Mapping CSV data source fields to Skills Management User Fields is similar to **mapping WFM data source fields** to Skills Management User Fields. However, the exception is that you must select the CSV file name (to be imported) in the **Data Source** column.

The screenshot shows the Genesys ORGDATA SETUP interface. The left sidebar contains navigation options: USER, REPORTING, DNA, ADMIN, Users, Users & Hierarchy, Roles & Widgets, Groups, Rules, Import Users, OrgData Setup (highlighted), Assessments, KPIs, DNA, and Scheduling. The main area is titled 'ORGDATA SETUP' and 'MAP TO USER FIELDS'. It features a table with columns for 'Data Source', 'Merge Method', 'Source Field', 'User Field', and 'Is Key'. The 'Data Source' dropdown is set to 'OrgdataCSV', which is circled and pointed to by an arrow with the text 'Select .csv file here'. The 'Merge Method' dropdown is set to 'Update only'. The 'Source Field' and 'User Field' mapping table is shown below, with fields like JobRole, Permissions, EmployeeID, JobRole, SKM Role, and Login ID. The 'Is Key' column has checkboxes for each field. At the bottom, there is an 'ADD' button and a pagination control showing '10 Items per page'.

In a practical use case, WFM is the master source of data and it manages:

- New user creation
- Hierarchy reorganisation
- Archiving of leavers

Important

- The CSV file is generally used to update existing users with their Job Role and User Permissions Role.
- You can set a default password for all the users from the CSV data source file and map it to the **Password** field in PDNA. While creating a default password, ensure that it

adheres to the password rules set in the **Password Settings** (in **General Settings** tab) as the system validates the imported password by using the password rules.