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Genesys Administrator Extension Help

Bulk Provisioning of Configuration Objects

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Bulk Provisioning of Configuration Objects

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

You can also use GAX to download (or export) information for selected objects. If you want, you can use this download to create a "template" for the data upload.

This import/export functionality is available for the following object types:

- DNs and DN Groups
- Places and Place Groups
- Persons (Users), including Agents
- Agent Groups
- Agent Logins

You can use GAX to download (or export) information for selected objects. If you want, you can use this download to create a "template" for the data upload.

This section describes how to export and import the files. Refer to the object type for the particular information that can be included in the file, and for examples of a prepared spreadsheet and file.

Exporting Data

GAX allows you to export data from existing data records into a spreadsheet called **download.csv**. Depending on what you are doing, you can modify the spreadsheet as required, save it as a **.csv** file, and **upload** it back into GAX. Or, you can export the data for just one object, remove the data (but not the column headers) from it, and use this "empty" template for present and future uploads of updated data.

To export data, do the following:

1. In Configuration Manager, select those objects for which you want to export data.
2. Click **Export** in the **More** menu. The column picker window displays the required columns for the type of objects you have selected. The set of required columns differs between object types. You can change the order in which these columns appear in the output file, but you cannot remove them from the list.
3. From the other tables in the column picker window, 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.

The CSV File

The content of the CSV file differs depending on the object type that you are importing or exporting, as follows:

- **DNs**
- **DN Groups**
- **Places**
- **Place Groups**
- **Persons**
- **Agent Groups**
- **Agent Login**

Uploading a File

Before uploading the bulk updates, you must enter the data into a spreadsheet and save it as a CSV file. Keep in mind the following recommendations:

- If most of your updates are adding new objects, create an empty template and fill in the appropriate values.
- If you are primarily making changes to existing objects, **export** existing data and make the necessary additions and changes. You can export the information for just those objects, saving you from filling in the mandatory information for them.

To upload the data into GAX, do the following:

1. Navigate to the list of objects that you are adding to or updating.
2. In the **More** menu, click **Import**.
3. Click **Select File** and, using the file browser, select your CSV file.
4. 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.
 - 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**.
5. 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.
 - Click **STOP Operation**, then click **Yes, STOP Operation** to confirm. When processing stops, you are returned to the list view.

6. If you did not stop the upload, GAX displays **Operation Concluded** 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 object list.