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Genesys Skills Management Automated Install and Upgrade Guide

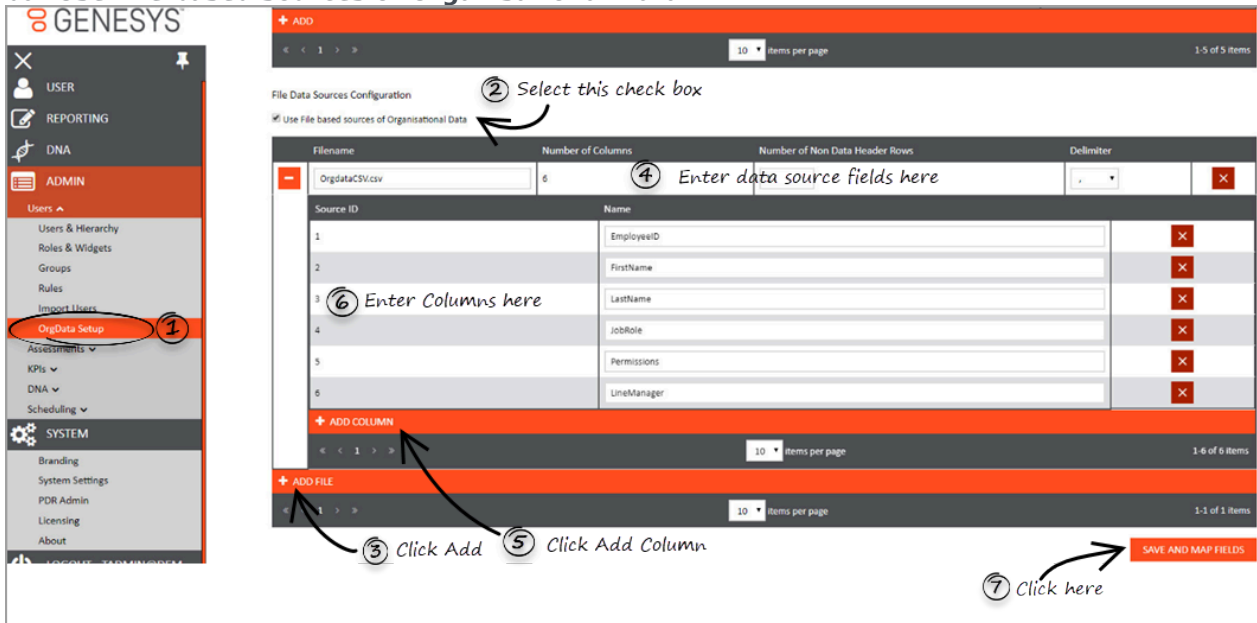
Configuring a CSV File as Data Source

4/12/2025

Configuring a CSV File as Data Source

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 a 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.

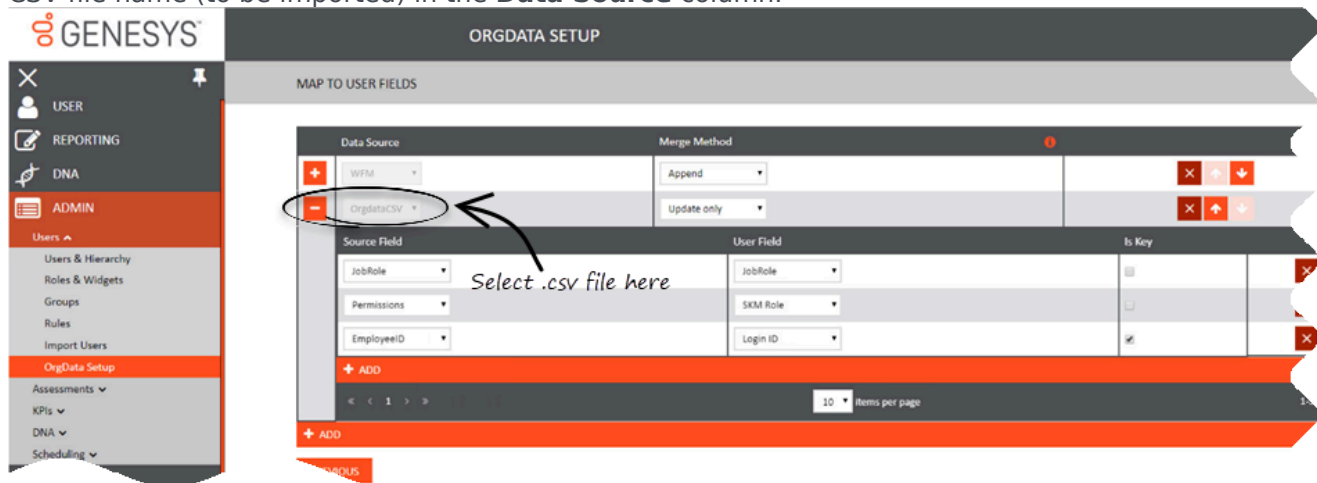
Important

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.



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.