PureConnect®

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See Change Log for summary of changes.

CSV List Import

Technical Reference

Abstract

This document how create multiple "non-managed" SIP stations, managed IP phones and associated SIP stations, and users by importing CSV lists in IC Setup Assistant and Interaction Administrator.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

Introduction to CSV List Import

A CSV (comma-separated value) list is text file containing information separated by commas. Genesys encourages the use of imported CSV lists in new CIC installations for the following purposes:

- Create **multiple "non-managed" SIP stations** by importing a CSV list containing SIP station information in **Add Stations Assistant** in IC Setup Assistant or Interaction Administrator.
- Create **multiple managed IP phones and associated SIP stations** by importing a CSV list containing IP phone information in **Managed IP Phones Assistant** in Interaction Administrator.
- Create **multiple users** by importing a CSV list containing user information in **Add Users Assistant** in IC Setup Assistant or Interaction Administrator.

This documentation explains how to use the sample Microsoft Excel spreadsheets and CSV lists included on the CIC 2015 R1 or later `.iso` file to prepare the CSV lists, download them to the CIC Server, and import them in the appropriate "Assistant" wizard.

Location of sample CSV list files on the 2015 R1 or later .iso file

Sample Microsoft Excel spreadsheets and CSV lists are included in the `\Additional Files\CSV Lists` directory on the CIC 2015 R1 or later `.iso` file.

1. Download, copy, and mount the CIC 2015 R1 or later `.iso` file on a file server and share it as described in the *PureConnect Installation and Configuration Guide*.

2. Navigate to the `\Additional Files\CSV Lists` directory on the `.iso` file share directory.

3. Use the appropriate Microsoft Excel (`.xls`) file to fill in SIP station, IP phone, or user information, and save it as a `.CSV` file, which resembles the sample `.CSV` file in this directory.

Create non-managed SIP Stations by importing a CSV list in Add Stations Assistant

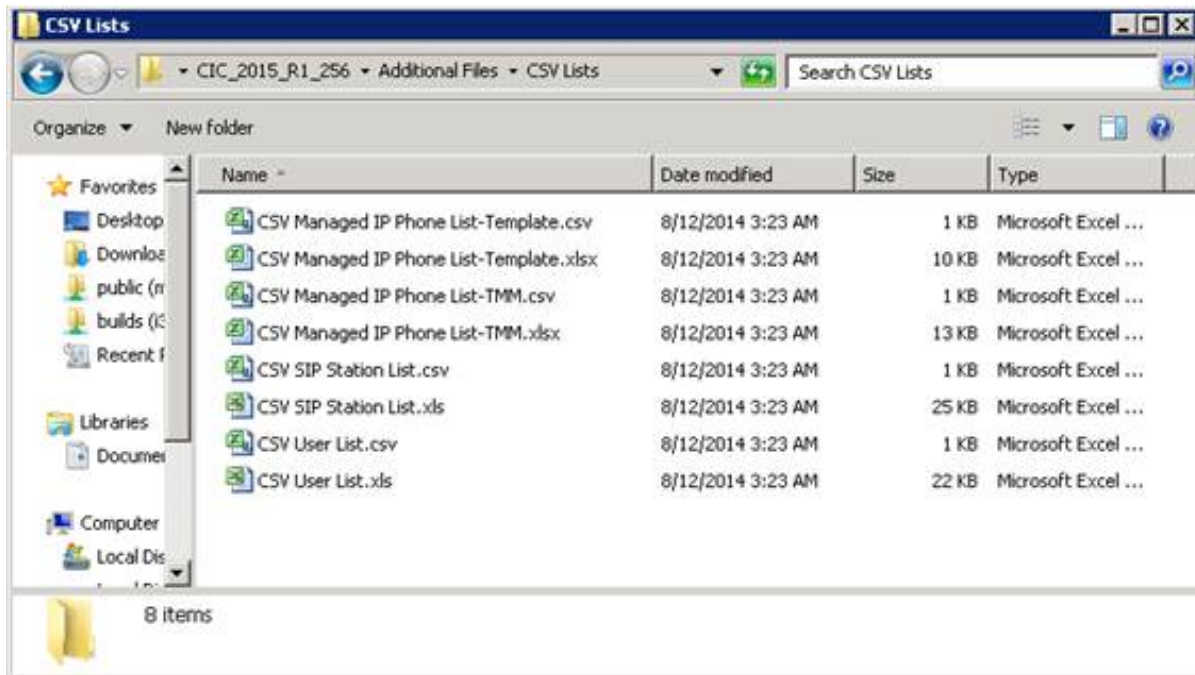To create multiple *non-managed* SIP stations, import a CSV list containing SIP station information in Add Stations Assistant in either IC Setup Assistant or Interaction Administrator.

> **Notes:**
> For Polycom phones, we recommend that you create managed IP phones. However, you may choose to leave your Polycom phones as *non-managed* SIP stations. With non-managed Polycom phones, managers must maintain separate Polycom phone configuration files.
>
> Examples of *non-managed* SIP stations are IP phones other than Polycom such as Astra or Cisco, stand-alone fax machines, and remote stations.
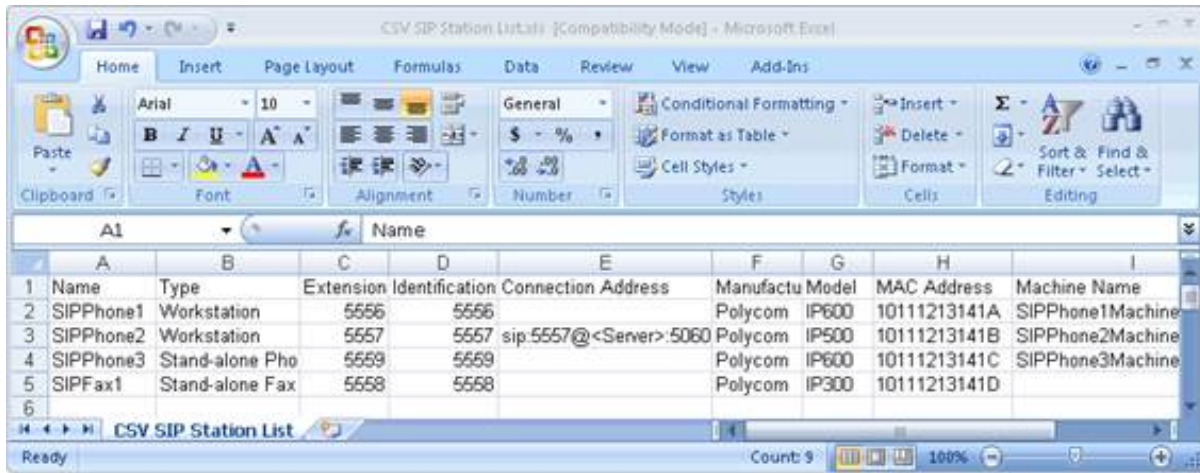
In this section:

- Create a SIP Station CSV list
- Import a SIP Station CSV list in Add Stations Assistant

Create a SIP Station CSV list

To create a CSV SIP station list:

1. Open a copy of CSV SIP Station List.xls.

The following table provides descriptions of each attribute.

Attribute	Description
Name	Type the station name (required).
Type	Workstation, phone or fax.
Extension	Type unique extension number for this SIP station
Identification Address	Type the identification address for this SIP station
Connection Address	Type the SIP address used to call this SIP station.
Manufacturer	Type the manufacturer of the phone for this SIP station. Possible values are: Polycom, Cisco, Generic, or free text entry.
Model	Type the specific type of phone model made by the phone manufacturer.
MAC Address	Type the MAC address of this phone.
Machine Name	Maps a machine to this station for licensing.

2. Type the attributes in the appropriate columns for each SIP station to create.
3. Save the file as ".csv" file type on the CIC Server or another location.

3. If a message indicating that the ".csv" file cannot preserve some of the macros in the Excel file appears, click **Yes**. Add Stations Assistant doesn't need those macros when importing the file.
4. Download your SIP Stations CSV list to a secure location on the CIC Server.

   When you open the CSV file in a text editor, the SIP Station information is separated by commas, with one station listed per line.

Import a SIP Station CSV list in Add Stations Assistant

You can import the CSV SIP Station list in Add Stations Assistant as part of a new CIC installation in IC Setup Assistant, or post-installation in the **Stations** container in Interaction Administrator. For more information about IC Setup Assistant, see the *PureConnect Installation and Configuration Guide*. For more information about Interaction Administrator, see the *Interaction Administrator* documentation.

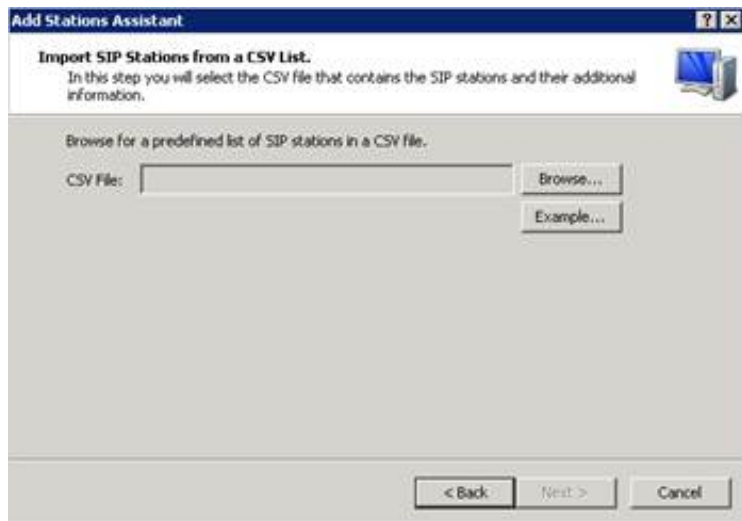To import a SIP Station CSV list in Add Stations Assistant:
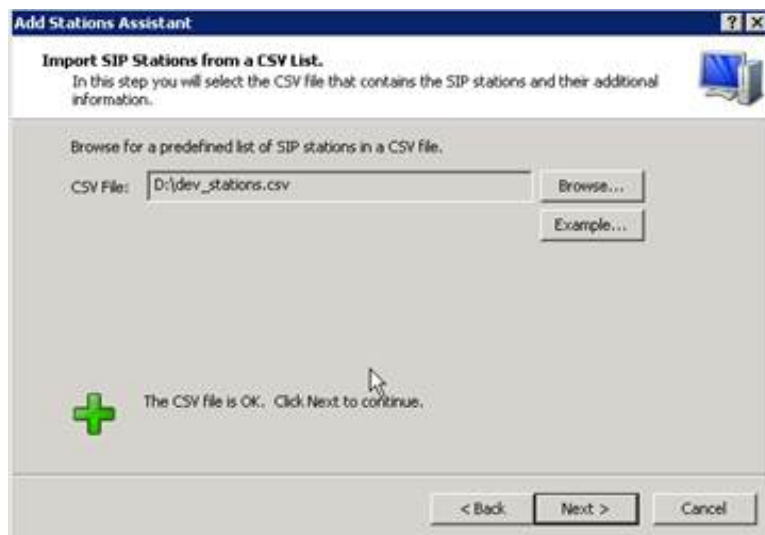
1. Run IC Setup Assistant.
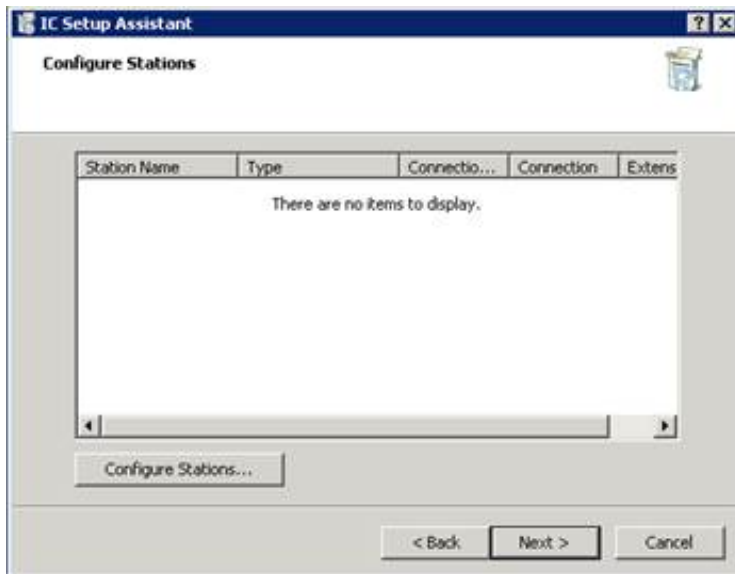
2. In the **Configure Stations** dialog box, click **Configure Stations**. The **Welcome** page of the Add Stations Assistant wizard appears.

3. Click **Next**. The **Import SIP Stations from a CSV list** page appears.

4. Download the CSV SIP station list file to the CIC Server.
5. Click **Browse...**
6. Locate the CSV file on the CIC Server and select it. The path and file name appear in the **CSV File** box.

7. Click **Next**. If IC Setup Assistant encounters errors while parsing the CSV file, a warning message appears.
8. To view the status and description of the errors, click **Errors**.

- **Warning** error: IC Setup Assistant cannot verify one or more values. You can continue with the import, but some of those values won't import.
- **Severe** error: IC Setup Assistant detects no columns in the file or it couldn't open the file. You cannot continue with the import.

9. Correct the errors in the CSV file and then click **Next** to continue with the import. The **Review the Imported SIP Stations** page appears, populated with the information from the CSV file.
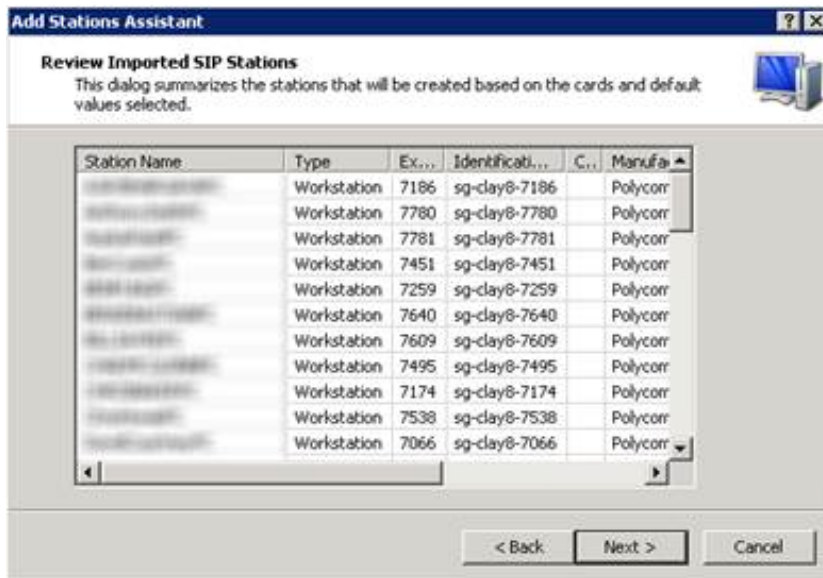
10. Review the station information. If the information is not correct, click **Back** to correct it and then return to this page of the wizard.

11. Click **Next**. The **Access Control** page appears, which allows you to specify the outbound dialing privileges (if any) for the new stations.
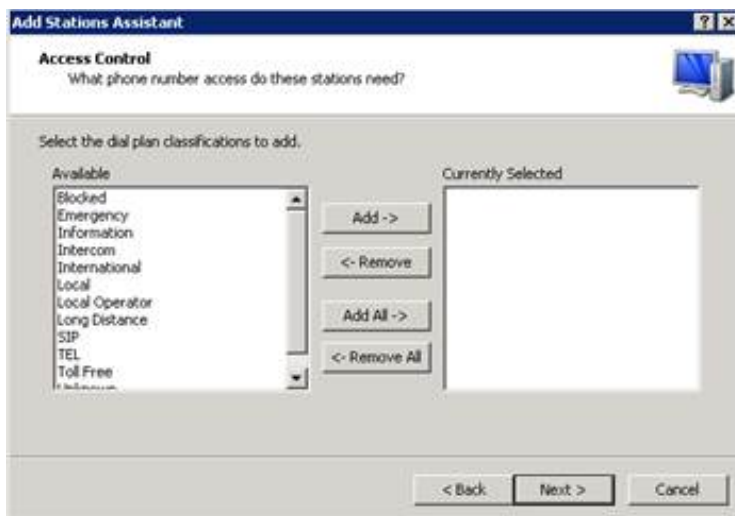
**Note:** If you did not create a dial plan in IC Setup Assistant, no classifications appear in the **Available** list box. Create a dial plan in Interaction Administrator and then run Add Stations Assistant in Interaction Administrator to specify the outbound dialing privileges for your stations.

12. Do one of the following:

- To assign one or more privileges to the new stations, in the **Available** list box, click each classification name and then click **Add->**. The selected classification names appear in the **Currently Selected** list box.
- To assign all dialing privileges (including new classifications added later) to the new stations, click **Add All->**. All classification names appear in the **Currently Selected** list box.

    Note: If someone attempts to place a call from a station and one of the phone number classifications for the station doesn't support the dialed phone number, CIC plays a prompt indicating that the station does not have sufficient dialing privileges to place the call.

13. Click **Next**. The **Saving SIP Station Data** page appears.
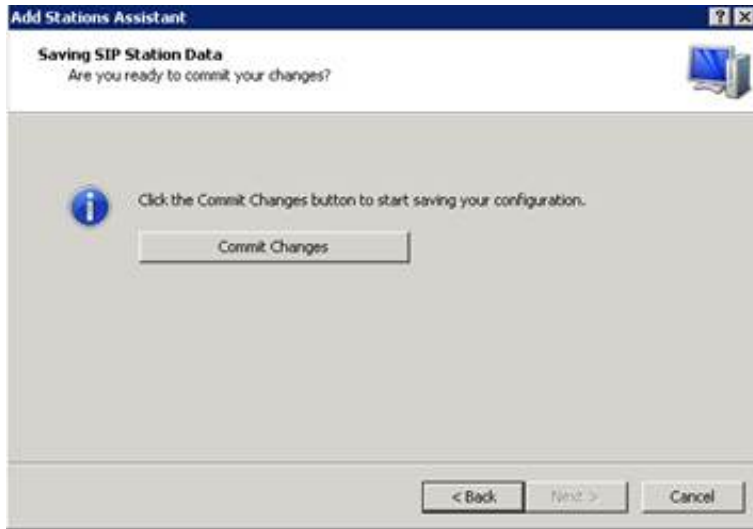
14. Click **Commit Changes**. The system saves your station configuration and the **Station Licenses** page appears.
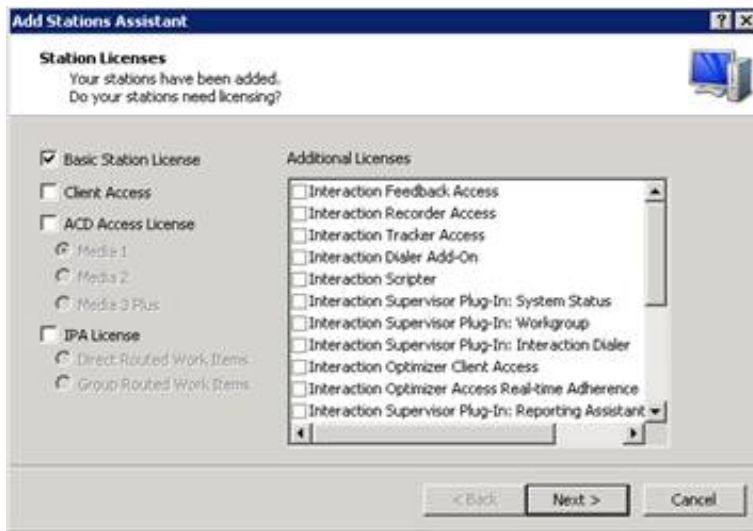
We recommend that you assign a Basic Station license to the stations. The Basic Station license allows station audio for a phone device or the soft phone on a client workstation.

- All stations require a Basic Station License to receive audio. (You can use a non-audio station for non-audio interactions.)
- Remote stations require a Basic Station license.
- A Standalone Fax and Standalone Phone require a Basic Station license.
- A Bus Device Fax does not use a Basic Station license.

For more information about the Access licenses, see *Add Stations Assistant* documentation.

15. Specify the licenses to assign to the stations and then click **Next**. The **Completing Add Stations Assistant** page appears.

16. Do one of the following:

- To add more stations (for example, more than one station card is installed), click **I want to add additional stations** and then click **Next**. Add Stations Assistant runs again.
- To save the stations and close the wizard, click **Finish**. IC Setup Assistant reappears.

Create managed IP phones and associated SIP stations by importing a CSV list in Managed IP Phone Assistant

The recommended procedure for creating new Polycom, Interaction SIP Station, SIP Soft Phone, AudioCodes, and Genesys managed IP phones and associated SIP stations is to import a CSV list in Managed IP Phone Assistant in Interaction Administrator. Complete the procedures described in this section post-CIC Server installation.

In this section:
- [Create managed IP phone templates](#).
- [Create CSV Managed IP Phone list(s)](#).
- [Create managed IP phones with Managed IP Phone Assistant](#).
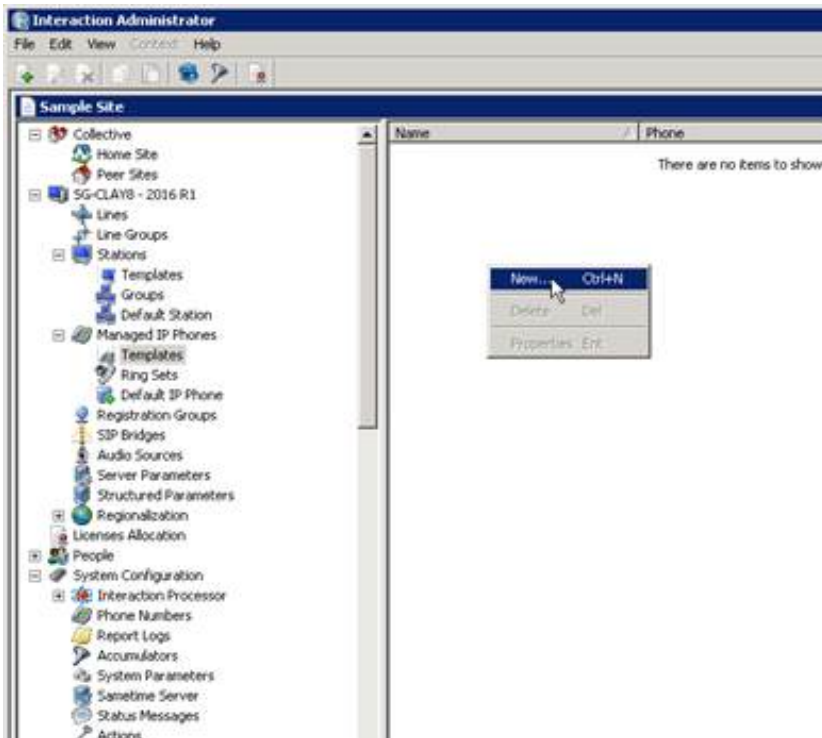
Create managed IP phone templates

We recommend that you plan the IP phone configuration you want for your CIC system. If it is appropriate for your site, create one or more managed IP phone templates based on your planning decisions. For example, you can create separate templates for the following situations:

- The CIC system has Polycom phones (perhaps a variety of Polycom models), SIP Soft Phones, Interaction SIP Station phones, AudioCodes, and Genesys phones.
- The CIC system has IP phones in a variety of locations.
- The audio stream on certain IP phones decrypts using RTP, and others encrypt using SRTP.
- Certain IP phones have regular station appearances, and others have shared station appearances.

> **Note:** Templates are most useful for significant quantities of the phones of the same type, manufacturer, model, etc. For example if your site has 30 Polycom IP335 phones, one IP7000 conference phone (for a conference room), one IP670 phone (for the CEO), one IP650 for the receptionist, a template is recommended for the IP335's but is not needed for the other three phones.

To create managed IP phone templates:

1. In the Interaction Administrator **Managed IP Phones** container, click **Templates**, right-click in the right pane, and then click **New…**.

   The **New Managed IP Phone Template** dialog box appears.

**Name**: Type the name of the new managed IP phone template.

Type: Select the type of IP phone for this template - Workstation or Stand-alone Phone. The default is **Workstation**.

Note: For Interaction SIP Station phones, select Workstation (Stand-alone Phone is not supported).

Manufacturer: Select the IP Phone manufacturer. Currently, the supported manufacturers are **AudioCodes, Genesys**, **ININ** (Genesys), and **Polycom**. Select **ININ** for Interaction SIP Station and SIP Soft Phone.

Model: Select the phone model based on the manufacturer. If the manufacturer is AudioCodes, Genesys, or Polycom, choose from a list of AudioCodes, Genesys, or Polycom phone models. If the manufacturer is ININ, choose either Interaction SIP Station or Soft Phone.

2. Complete the information and then click **OK**. The **Managed IP Phone Template Configuration** dialog box appears.
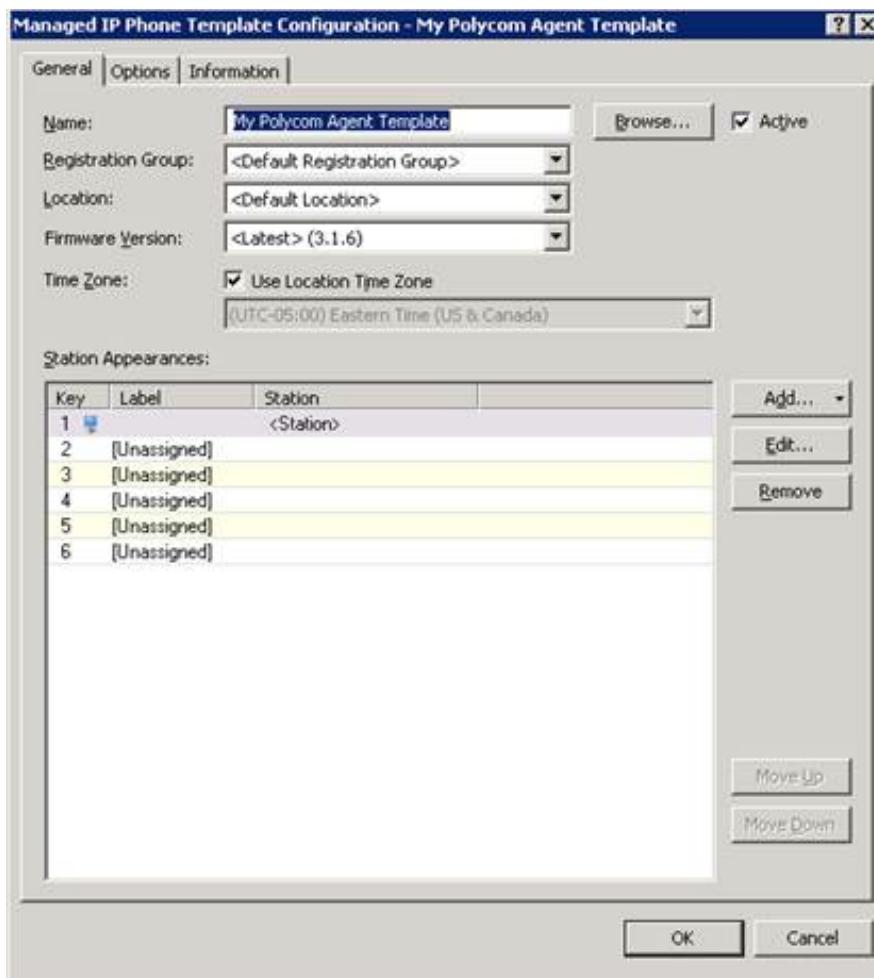
3. Select or add the appropriate configuration items in the **General** and **Options** (including **Advanced Options** for Polycom and Interaction SIP Station phones) tabs *for this managed IP phone template.*

    For more information about advanced configuration, see "Advanced Configuration" in the Polycom Phone Features Configuration Technical Reference. You can also click **Help (?)** for details on individual configuration items.

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> **Note:** We recommend that specify as many configuration items as possible, instead of selecting the default settings. The time spent on defining the template now saves you time later.

4. Click **OK**. The managed IP phone template appears in **Managed IP Phones…Templates**.
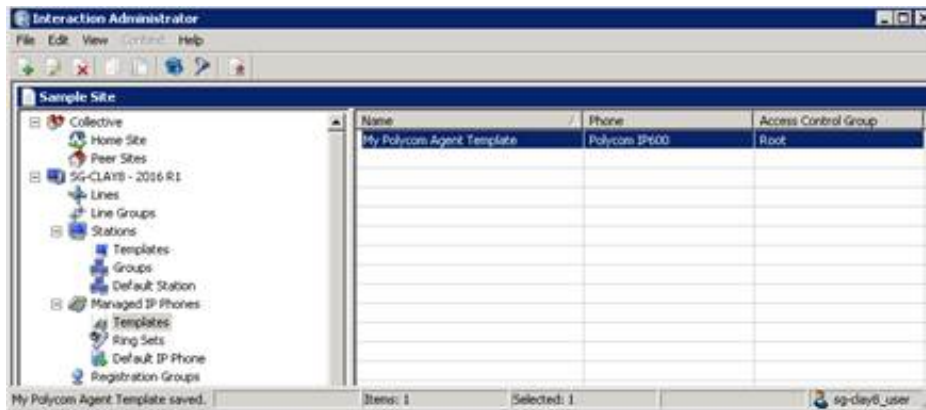
Create CSV Managed IP Phone list(s)

Once you have created the managed IP phone template(s), create one or more **CSV Managed IP Phone lists** based on one of the following aspects:

- **Template:** Containing name, template, proxy group, extension, identification address, label, and address information for the appropriate IP phones in your CIC system. Each IP phone must reference one of the managed IP phone templates you have created by name.
- **Type, Manufacturer, and Model** containing name, type, manufacturer, model, proxy group, extension, identification address, label, and address information for the appropriate IP phones in your CIC system.

Two sample Managed IP Phones CSV lists corresponding to the two types of CSV lists are Additional Files\CSV Lists directory on the .iso file share directory.

- `CSV Managed IP Phone List-Template.csv` and `CSV Managed IP Phone List-Template.xlsx`
- `CSV Managed IP Phone List-TMM.csv` and `CSV Managed IP Phone List-TMM.xlsx`

When you run Managed IP Phone Assistant, you import a completed CSV Managed IP Phone list.

In this section:

- Create a CSV Managed IP phone-Template list
- Create a CSV Managed IP phone-TMM list

Create a CSV Managed IP phone-Template list

Follow this procedure to create a CSV managed IP phone based on template.

To create a CSV Managed IP Phone-Template list:

1. Open a copy of CSV Managed IP Phone List-Template.xlsx.

The following table provides descriptions of each attribute.

Attribute	Description
Name	(Required) Type the name of the IP phone.
Template	(Required) Type the managed IP phone template for this IP phone. The template name must be identical to one of the templates you have created.
Proxy Group	Type the Registration (Proxy) Group to be used with the managed IP phone template for this IP phone. If this value is left blank, Managed IP Phone Assistant will fill in the Registration Group defined in the template.
Extension	Type the primary appearance extension number for this IP phone. When this value is left blank, it will remain blank in Managed IP Phone Assistant.
Identification Address	If you know the IP address for this IP phone ahead of time, type the SIP connection address in the form of `sip:xxx@[IPaddress]:[portnumber]`, e.g., `sip:320@172.17.238.68:5060`. If you do not know the IP address, leave this value blank. It will be filled in when the phone registers with the CIC Server following provisioning.
Label	(Polycom only) Type the label that will be used for the primary appearance of this IP phone and the associated SIP station. Typical values for "label" are the station extension or the user's extension (in the case where one user will almost always be using the station). When this value is left blank, Managed IP Phone Assistant will fill in the **Name** attribute (IP phone name).
Address	If you know the address for this IP phone ahead of time, type: For Polycom phones: The MAC address of the IP phone. Polycom addresses start with `00:04:f2`. For SIP Soft Phones: The full computer name for the IP phone. To make sure you get the full computer name, navigate to **My Computer** > **Properties** > **Computer Name** and note the **Full Computer Name**. For example: `PattyJ.acme.com`. For Interaction SIP Station phones: The MAC address of the IP phone. Interaction SIP Station MAC addresses start with `00.26.fd`. For AudioCodes or Genesys phones: The MAC address of the IP phone. AudioCodes and Genesys addresses start with `00:90:8f`. If you do not know the address ahead of time: For Polycom phones: You must manually provision using the provisioning IVR. For SIP Soft Phones: You must manually provision using the SIP Soft Phone Provisioning wizard. For Interaction SIP Station phones: The Interaction SIP Station cannot be provisioned through the provisioning IVR. If the MAC address was not known at the time the CSV list is created, the MAC address must be manually entered for each Interaction SIP Station in the Interaction Administrator Managed IP Phone container before the corresponding phone is set up and booted. For AudioCodes or Genesys phones: You must manually provision using the provisioning IVR.

2. Type the attributes in the appropriate columns for each managed IP phone and associated SIP station to create.
3. Save the file as ".csv" file type.
4. If a message indicating that the ".csv" file cannot preserve some of the macros in the Excel file appears, click **Yes**. Managed IP Phone Assistant doesn't need those macros when importing the file.

Here is an example of the resulting CSV Managed IP Phone List.csv file as it appears in Excel:

When the CSV file is opened in a text editor, the IP phone information is separated by commas, with one IP phone listed per line.
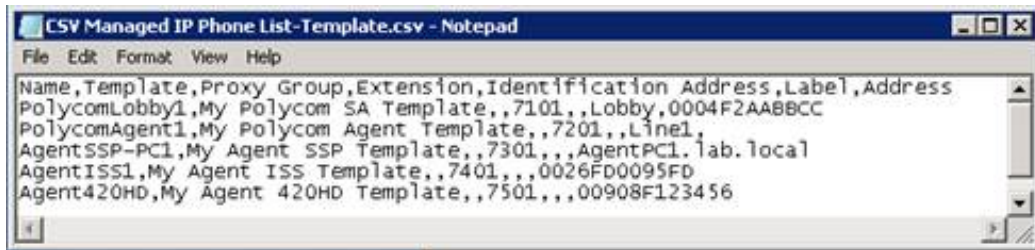
5. Download your CSV Managed IP Phone list-Template.csv file to a secure location on the CIC Server.

Create a CSV Managed IP phone-TMM list

Follow this procedure to create a CSV managed IP phone based on type, manufacturer and model.

To create a CSV Managed IP Phone-TMM list:

1. Open a copy of CSV Managed IP Phone List-TMM.xlsx.

The following table provides descriptions of each attribute.

Attribute	Description
Name	(Required) Type the name of the IP phone.
Type	(Required) Type the type of IP phone - Workstation or Stand-alone Phone. **For Interaction SIP Station phones**: Type Workstation. (Stand-alone Phone is not supported).
Manufacturer	(Required) Type the IP phone manufacturer. Currently, the supported manufacturers are **AudioCodes, Genesys**, **ININ**, and **Polycom**.
Model	(Required) Type the phone model based on the manufacturer. **If the manufacturer is Polycom**: Type the Polycom phone model. **If the manufacturer is ININ**: If the manufacturer is ININ, type Soft Phone or Interaction SIP Station. **If the manufacturer is AudioCodes or Genesys**: Type the AudioCodes or Genesys phone model.
Proxy Group	Type the Registration (Proxy) Group to be used with the managed IP phone template for this IP phone. If this value is left blank, Managed IP Phone Assistant will fill in the default Registration Group.
Extension	Type the primary appearance extension number for this IP phone. When this value is left blank, it will remain blank in Managed IP Phone Assistant.
Identification Address	If you know the IP address for this IP phone ahead of time, type the SIP connection address in the form of `sip:xxx@[IPaddress]:[portnumber]`, e.g., `sip:320@172.17.238.68:5060`. If you do not know the IP address, leave this value blank. It will be filled in when the phone registers with the CIC Server following provisioning.
Label	(Polycom only) Type the label that will be used for the primary appearance of this IP phone and the associated SIP station. Typical values for "label" are the station extension or the user's extension (in the case where one user will almost always be using the station). When this value is left blank, Managed IP Phone Assistant will fill in the **Name** attribute (IP phone name).
Address	If you know the address for this IP phone ahead of time, type: **For Polycom phones**: The MAC address of the IP phone. Polycom addresses start with `00:04:f2`. **For SIP Soft Phones**: The full computer name for the IP phone. To make sure you get the full computer name, navigate to **My Computer>Properties>Computer Name** and note the **Full Computer Name**. For example: `PattyJ.acme.com`. **For Interaction SIP Station phones**: The MAC address of the IP phone. Interaction SIP Station MAC addresses start with `00.26.fd`. **For AudioCodes or Genesys phones**: The MAC address of the IP phone. AudioCodes and Genesys addresses start with `00:90:8f`. If you do not know the address ahead of time: **For Polycom phones**: You must manually provision using the provisioning IVR. **For SIP Soft Phones**: You must manually provision using the SIP Soft Phone Provisioning wizard. **For Interaction SIP Station phones**: The Interaction SIP Station cannot be provisioned through the provisioning IVR. If the MAC address was not known at the time the CSV list is created, the MAC address must be manually entered for each Interaction SIP Station in the Interaction Administrator Managed IP Phone container before the corresponding phone is set up and booted. **For AudioCodes or Genesys phones**: You must manually provision using the provisioning IVR.

2. Type the attributes in the appropriate columns for each managed IP phone and associated SIP station to create.
3. Save the file as ".csv" file type.
4. If a message indicating that the ".csv" file cannot preserve some of the macros in the Excel file appears, click **Yes**. Managed IP Phone Assistant doesn't need those macros when importing the file.

Here is an example of the resulting `CSV Managed IP Phone List-TMM.csv` file as it appears in Excel:

When you open the CSV file in a text editor, the managed IP phone information is separated by commas, with one phone listed per line.

```
CSV Managed IP Phone List-TMM.csv - Notepad
File  Edit  Format  View  Help
Name,Type,Manufacturer,Model,Proxy Group,Extension,Identification Address,Label,Address
PolycomLobby2,Stand-alone Phone,Polycom,IP330,,7102,,Lobby,
PolycomAgent2,Workstation,Polycom,IP601,,7202,,Line1,0004F204F6A9
AgentSSP-PC2,Workstation,ININ,Soft Phone,Remote Agent SSP - TLS,7302,7302,,
AgentISS2,Stand-alone Phone,ININ,Interaction SIP Station,Remote Agent ISS - TCP,7402,7402,,0026FDF00020
Agent420HD,Stand-alone Phone,AudioCodes,420HD,,7502,7502,,00908F123456
```

5. If you have not already done so, **download your** `CSV Managed IP Phone list-TMM.csv` **file** to a secure location on the CIC Server.

Create managed IP phones with Managed IP Phone Assistant

The Managed IP Phone Assistant in Interaction Administrator guides you through the process of creating multiple managed IP phones and associated SIP stations from an imported CSV Managed IP Phone list. For more information, see *CIC Managed IP Phones Administrator's Guide* and *PureConnect Installation and Configuration Guide*.

> **Note:** We recommend that you run the Managed IP Phone Assistant outside of your core business hours because the procedure requires significant server resources.

To create managed IP phones with Managed IP Phone Assistant:

1. In the **Managed IP Phones** container, right-click in the right pane and click **Managed IP Phone Assistant**.
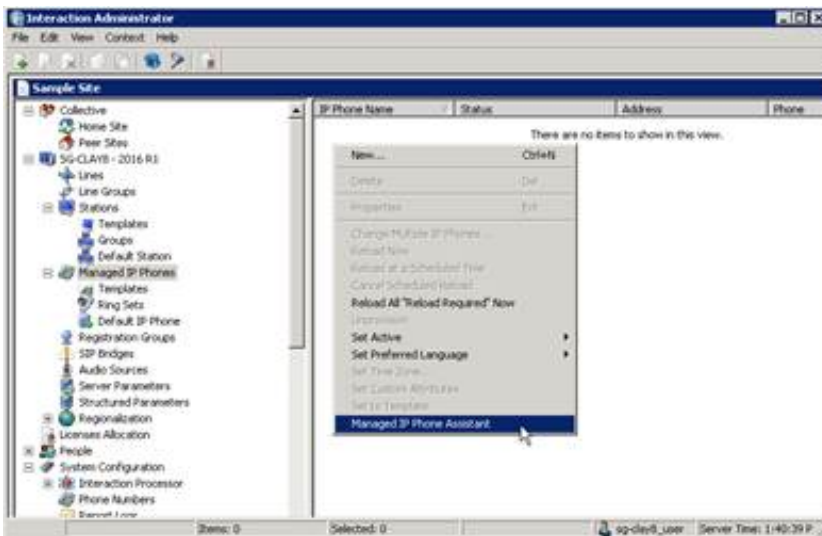
The **Welcome** page of the Managed IP Phone Assistant wizard appears.

2. Click **Next**. A warning message appears, recommending that you don't run the wizard during normal business hours.
3. If you are running Managed IP Phone Assistant after business hours, click **Yes**. The **Add Managed IP Phones** page appears.

4. Click **Create managed IP phones from a** `.CSV` **file**. The **Create Managed IP Phones from a CSV file** page appears.
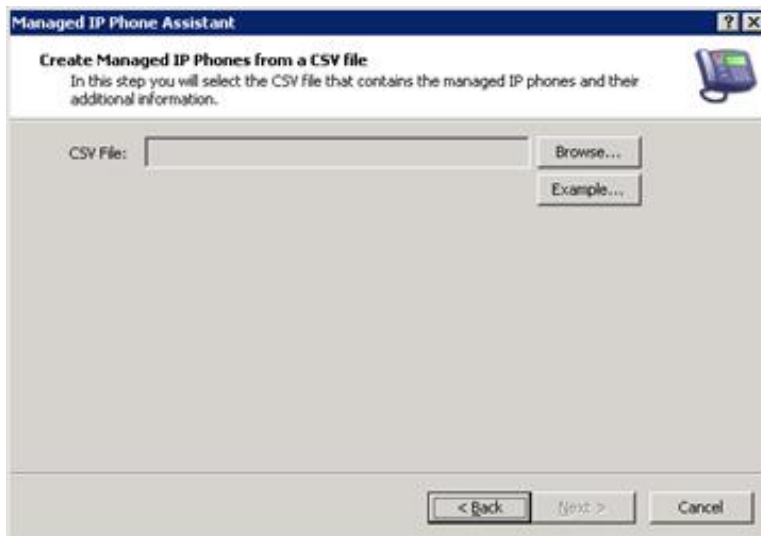
5. Click **Browse...**
6. Locate your `CSV Managed IP Phone List.cvs` file on the CIC Server and select it. The path and file name appear in the **CSV File** box.

7. Click **Next**. If the wizard encounters errors while parsing the CSV file, a warning message appears.

8. To view the status and description of the errors, click **Errors**.

   - **Warning** error: Managed IP Phone Assistant cannot verify one or more values. You can continue with the import, but some of those values won't import.
   - **Severe** error: Managed IP Phone Assistant detects no columns in the file or it couldn't open the file. You cannot continue with the import.

9. Correct the errors in the CSV file and then click **Next** to continue with the import. If you imported a CSV list based on type, manufacturer, and model (`CSV Managed IP Phone List-TMM.csv`), the **Access Control** page appears.

10. Do one of the following:

- To assign one or more privileges to the new managed IP phones and station, in the **Available** list box, click each classification name and then click **Add->**. The selected classification names appear in the **Currently Selected** list box.
- To assign all dialing privileges (including new classifications added later) to the new managed IP phones and station, click **Add All->**. All classification names appear in the **Currently Selected** list box.

  For more information, click Help **(?)**.

  > **Note:** If you imported a CSV list based on a template, this page does not appear because the dial plan classifications are already defined in the template.

11. Click **Next**. The **Saving Managed IP Phones** page appears.

---
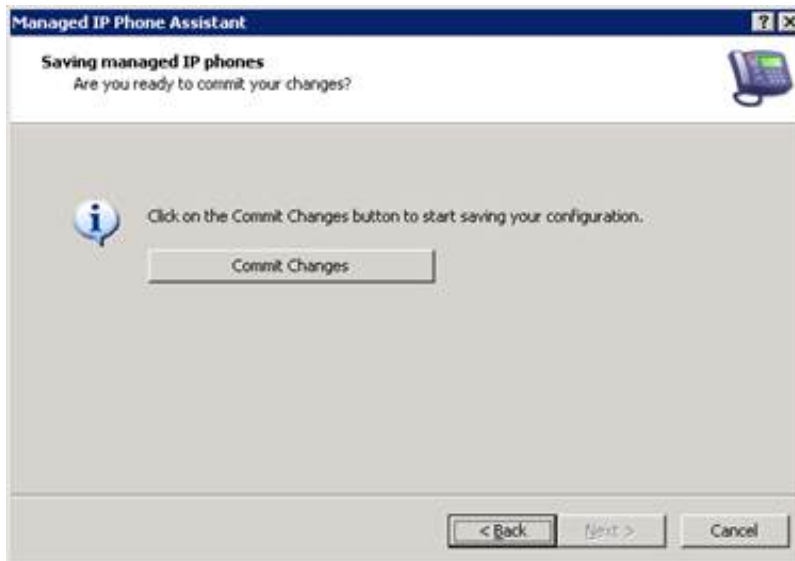
12. Click **Commit Changes**. The system saves your managed IP phones and the **Station Appearances Licenses** page appears.

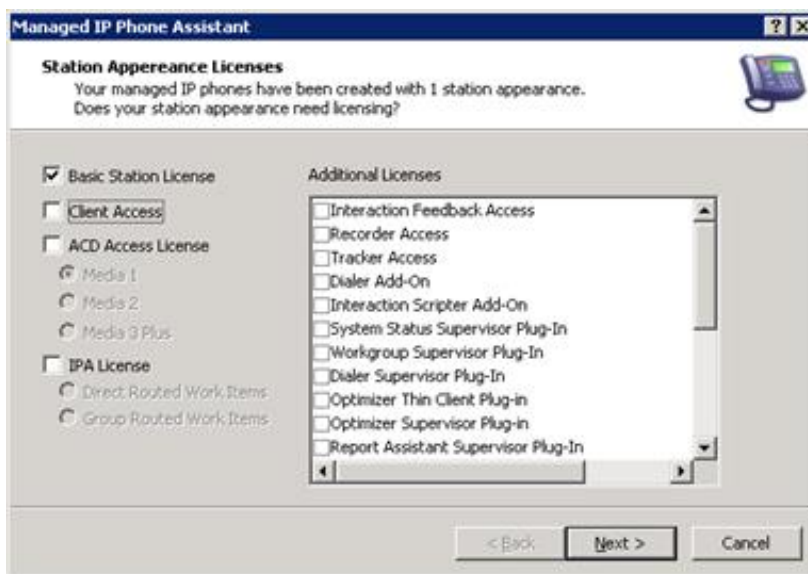> **Note:** If you imported a CSV list based on a template, this page does not appear because the station appearance licensing is already defined in the template.

The wizard assigns a Basic Station license to the SIP stations associated with managed IP phones. For more information about the licenses, click Help **(?)**.

13. Specify other licenses to assign to the stations and then click **Next**. The **Completing Add Stations Assistant** page appears.

> **Note:** If you exceed the total license count, a message appears indicating that the wizard couldn't allocate some or all licenses to each station appearance. Click **Review** to view the errors and then correct them in the Interaction Administrator **License Allocation** container.

14. Click **Finish.** The new managed IP phones appear in the **Managed IP Phones** container.

- The new managed IP phones have a **Status** of **Not registered**. Their status updates on the phones' next SIP registration.
- If you did not specify the **Address** attribute for one or more managed IP phones in your CSV Managed IP Phone list, they have a status of **Not provisioned**. Their status updates when you provision them using the Polycom phone, SIP Soft Phone, AudioCodes, or Genesys provisioning IVR. For Interaction SIP Station , their status updates when you type the MAC address for each Interaction SIP Station in Interaction Administrator before setting up and booting the corresponding phone.

As part of creating managed IP phones, the associated SIP station appearances created on those IP phones appear in the **Stations** container.

The SIP stations associated with managed IP phones are of the type **Managed Workstation** or **Managed Stand-alone Phone**.

You can assign Client Access licenses, ACD Access licenses, and add-on licenses to users on the **Licensing** tab now, or in the **Licenses Allocation** container.

For more information, see the *CIC Managed IP Phones Administrator's Guide* and *Interaction Administration* help.

Create users by importing a CSV list

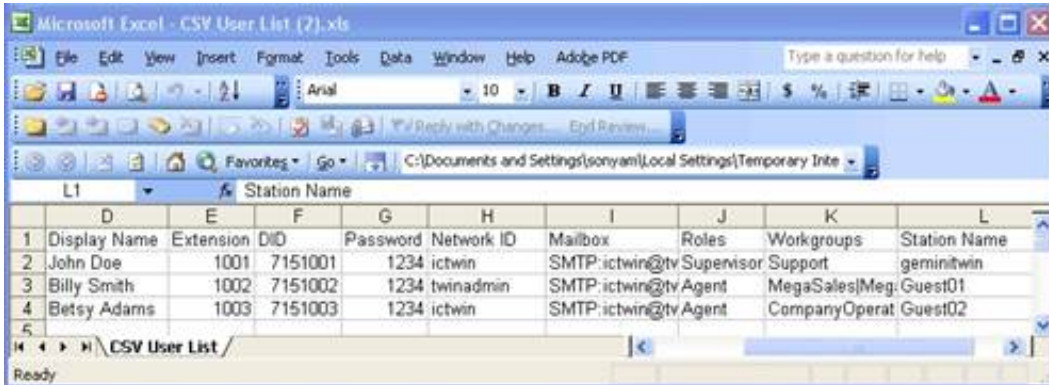This section describes the methods for creating users by importing a CSV list.

- Create a User CSV List
- Default roles
- Import a User CSV list in Setup Assistant
- Import a CSV User list in Add Users Assistant in Interaction Administrator

Create a User CSV List

To create a CSV user list:

1. Open a copy of CSV User List.xls.

The following table provides descriptions of each attribute.

Attribute	Description
User Name	Type a unique user name. That name must be registered as a valid network account and e-mail user account before the user can receive calls on the CIC system.
First name	Type the user's first name.
Last Name	Type the user's last name.
Display Name	Type the name to display on voicemails and faxes from this user. This information is also used for the Voice-Mail Only messaging account (if Interaction Message Store (Voice Mail Only) was chosen for this CIC Server.)
Extension	Type the user's extension.
DID	Type the user's Direct Inward Dialing number. This is the number a caller would dial to call this user directly to bypass the auto-attendant. Some users may not have a DID.
Password	If you type a user password here, it will be used. If you do not type a user password here, the assistant will automatically generate one. You will have an opportunity at the end of the import to view those passwords, and to copy them to a document for distribution. **Caution!** Keep these passwords confidential by keeping track of the password report presented at the completion.
Network ID	Type the unique identifier for the user's computer workstation. Also include the name of the domain. For example: `AcmeDomainRogerDPC`.
Mailbox	Type the e-mail address known by the mail provider, with an `SMTP:` prefix, for example: `SMTP:ictwin@twin.local` If the mail provider is Interaction Message Store (Voicemail only), no mailbox is needed. Instead, type `FBMC` in this column. The assistant will automatically assign a Voice Mail address.
Roles	Type the role that users should be assigned. It must be one of the following roles: ○ Administrator ○ Agent ○ Business User ○ Operator ○ Billable-Time User ○ Supervisor ○ Mobile Office User These roles each have certain associated dialing privileges, such as Long Distance calling and Emergency dialing. See "Default Roles" for more information. IC Setup Assistant automatically assigns the Operator Role to the default Company Operator. **Note:** You can add additional roles. IC Setup Assistant will create the role in Directory Services, but no permissions will be assigned to that role. After the CIC installation, you can assign the permissions in the Interaction Administrator Roles container.
Workgroups	Type the names of the workgroups the user should belong to. After the CIC installation, you can further define the workgroups in the **Interaction Administrator Workgroups** container. IC Setup Assistant creates a default Company Operator workgroup. All users are automatically assigned to the Company Operator workgroup. You can modify this for each user later in Interaction Administrator.
Station Name	Type the user's station name. This should be a computer of the user running a CIC client. The assistant uses this information to assign the correct CIC station account (whose name must be identical.)
OCS	Type `Yes` to enable the user for PC to PC communications only for Office Communications Server, which disables Enterprise Voice and PBX integrated settings. If left blank <null>, the system disables OCS integration for the user.

Note: After you import the CSV user list, you can change the values and add more users in **Interaction Administrator User** container, in the User Worksheet.

2. Type the attributes in the appropriate columns for each user to create.
3. Save the file as ".csv" file type in a secure location on the CIC Server.
4. If a message indicating that the ".csv" file cannot preserve some of the macros in the Excel file appears, click **Yes**. IC Setup Assistant doesn't need those macros when importing the file.

When you open the CSV file in a text editor, the user information is separated by commas, with one user listed per line.

Default roles

IC Setup Assistant creates seven roles automatically. If you assign these roles to users in your CSV User list, IC Setup Assistant assigns the roles to users when IC Setup Assistant creates the user.

The following table lists the attributes assigned to each role automatically. Each user that is a member of a role inherits the security settings for that default role. If a user has multiple roles, that user inherits security settings from multiple roles.

> **Notes:**
> • Any user not assigned a role will automatically be assigned the **Business User** role.
>
> • A user named Operator is always created and always assigned the role of **Operator**. Other users can also be assigned the **Operator** role if you want them to serve as operators.

Option	Administrator	Supervisor	Agent	Operator	Business User	Billable-Time User	Mobile Office
Show Pickup Button	X	X	X	X	X		
Show Disconnect Button	X	X	X	X	X		
Show Hold Button	X	X	X	X	X		
Show Transfer Button	X	X	X	X	X		
Show Voice Mail Button	X	X		X	X		
Show Listen Button	X	X					
Show Record Button	X	X		X	X		
Show Pause Button	X	X		X	X		
Show Mute Button	X	X	X	X	X		
Show Private Button	X	X			X		
Show Assistance Button	X		X	X			
Show Join Button		X					
Show Coach Button		X					
Customize CIC Client	X	X		X	X		
Record Calls	X	X		X	X		
Listen in on Calls	X	X					
Private Calls	X	X		X	X		
Publish Handlers	X						
Manage Handlers	X						
Debug Handlers	X						
Allow Workgroup Alerts	X	X					
Allow Workgroup Queue Alerts	X	X					
Allow Handler Trigger Alerts							
Remote Control							
Trace Configuration	X						

Follow Me	X	X		X	X		
Account Code Verification	X	X	X	X	X	X	X
IP Phone Provisioning Admin	X						
Allow Workgroup Statistics	X	X					
Require Forced Authorization Code	X						
Use TIFF for Faxes	X						
Allow Video	X						
Allow User Defined Telephone Number on Remote Login	X	X	X	X	X	X	X
Allow Persistent Connections	X						
Allow Supervisor Message Creation	X						
Allow Intercom Chat	X						
Allow Monitor Columns	X	X	X	X	X	X	X
Allow to Receive Voicemail	X	X	X	X	X	X	X
Allow Voicemail Access Via TUI	X	X	X	X	X	X	X
Allow Fax Access Via TUI	X	X	X	X	X	X	X
Allow Email Access Via TUI	X	X	X	X	X	X	X
ACL: Account Codes	*ALL	*ALL		*ALL	*ALL		
ACL: Activate Others	*ALL	*ALL					
ACL: Activate Self	*ALL	*ALL	*ALL		*ALL		
ACL: Client Buttons	*ALL						
ACL: EFAQ							
ACL: Interaction Files							
ACL: Interaction Messages							
ACL: Interaction URLs							
ACL: Miscellaneous							
ACL: Modify Attendant Configurations	*ALL	*ALL					
ACL: Modify Line Queue	*ALL						
ACL: Modify Station Queue	*ALL						
ACL: Modify User Queue	*ALL	*ALL					
ACL: Modify Workgroup Queue	*ALL	*ALL					
ACL: Phone Number Classifications	Some	Some	Some	Some	Some		
ACL: Plugins							
ACL: Response Management							

ACL: Status Messages	*ALL - inherited	*ALL - inherited	*ALL - inherited	*ALL - inherited	*ALL - inherited		*ALL - inherited
ACL: Tables							
ACL: View Attendant Configuration	*ALL	*ALL					
ACL: View Line Queue	*ALL						
ACL: View Optimizer Scheduling Units							
ACL: View Recorder Categories	*ALL	*ALL					
ACL: View Recorder Questionnaires	*ALL	*ALL					
ACL: View Report	*ALL	*ALL					
ACL: View Station Queue	*ALL						
ACL: View User Interaction History	*ALL	*ALL					
ACL: View User Queue	*ALL	*ALL					
ACL: View Workgroup	*ALL	*ALL	*ALL	*ALL	*ALL		
ACL: View Workgroup Queue	*ALL	*ALL					

*ALL = All items in the Access Control category are assigned by default.

Import a User CSV list in Setup Assistant

You can import the CSV user list as part of a new CIC installation in IC Setup Assistant. For more information about IC Setup Assistant, see the *PureConnect Installation and Configuration Guide*.
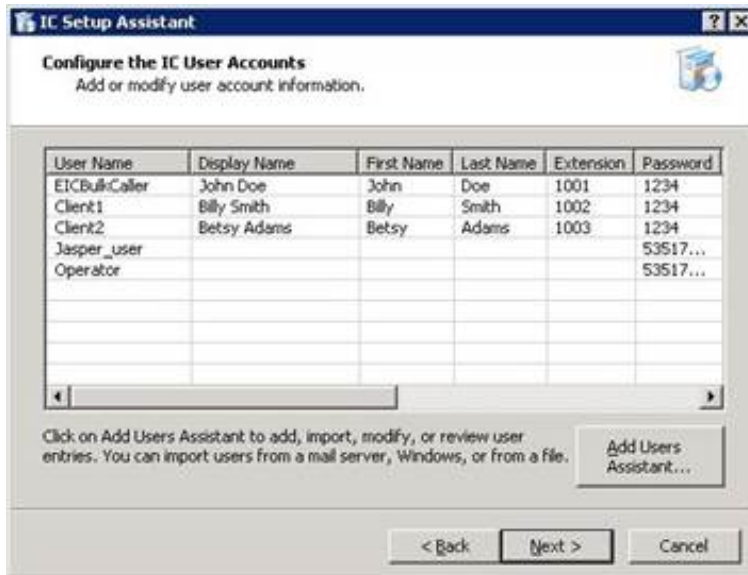
To import a CSV user list:

1. Run IC Setup Assistant.
2. On the **Create the IC User Accounts** page, click **I want to import users from a CSV file** and then click **Next**.

The **Import Users from a CSV User List** page appears.
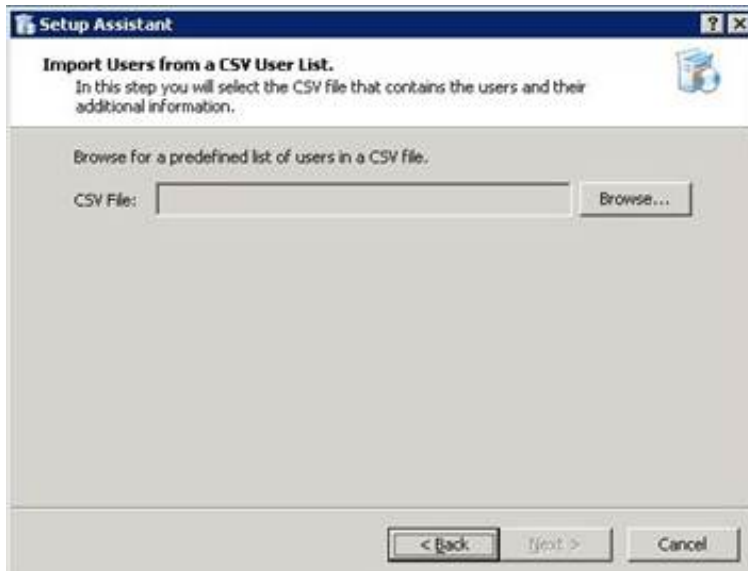
3. Download the CSV user list file to a **secure location** on the CIC Server.
4. Click **Browse...**
5. Locate your CSV file on the CIC Server and select it. The path and file name appear in the **CSV File** box.
6. Click **Next**. If the wizard encounters errors while parsing the CSV file, a warning message appears.

7. To view the status and description of the errors, click **Errors**.

   - **Warning** error: IC Setup Assistant cannot verify one or more values. You can continue with the import, but some of those values won't import.
   - **Severe** error: IC Setup Assistant detects no columns in the file or it couldn't open the file. You cannot continue with the import.

8. Correct the errors in the CSV file and then click **Next** to continue with the import. The **Configure the IC User Accounts** page appears, populated with the user information from the CSV file.


   IC Setup Assistant adds the required user accounts to **IC Administrator** and the default **Company Operator**.
9. To modify the imported users, click **Add Users Assistant...** and then click **Skip the search...**.

Import a CSV User list in Add Users Assistant in Interaction Administrator

The section describes how to import a CSV User list in Add Users Assistant post-installation in the **Users** container in Interaction Administrator. For more information about Interaction Administrator, see the *Interaction Administrator* documentation.
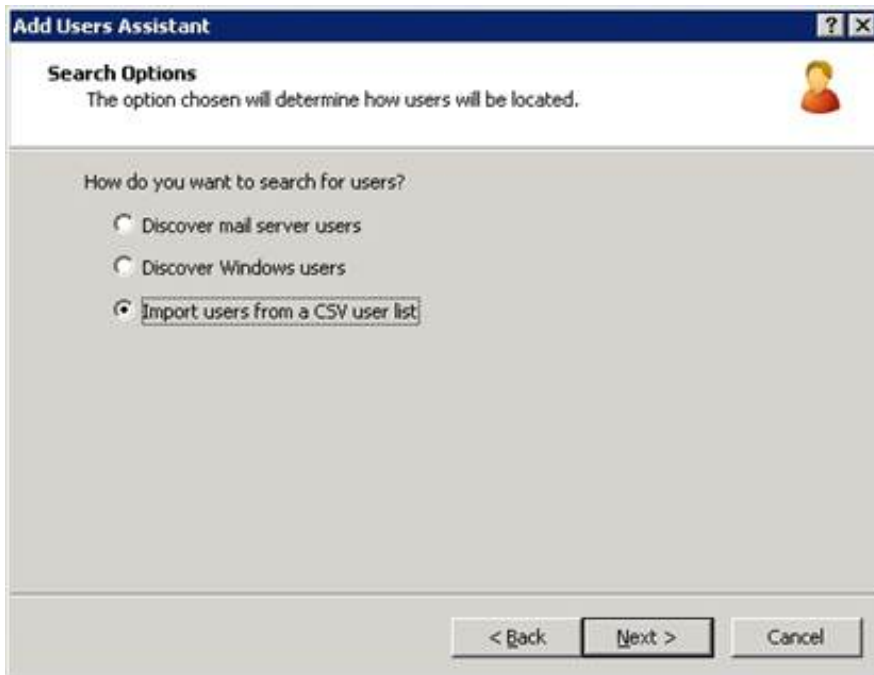
1. Click the **Users** container, right-click in the right pane, and then click **User Assistant and Worksheet…**.
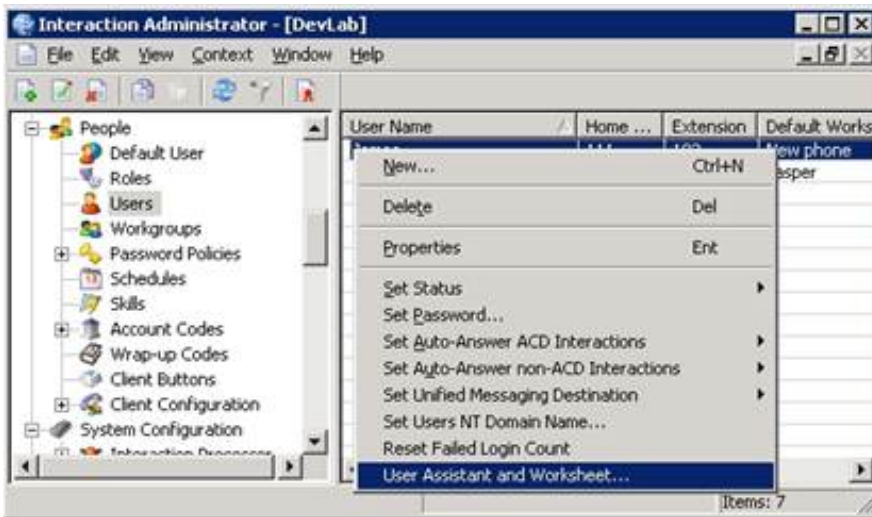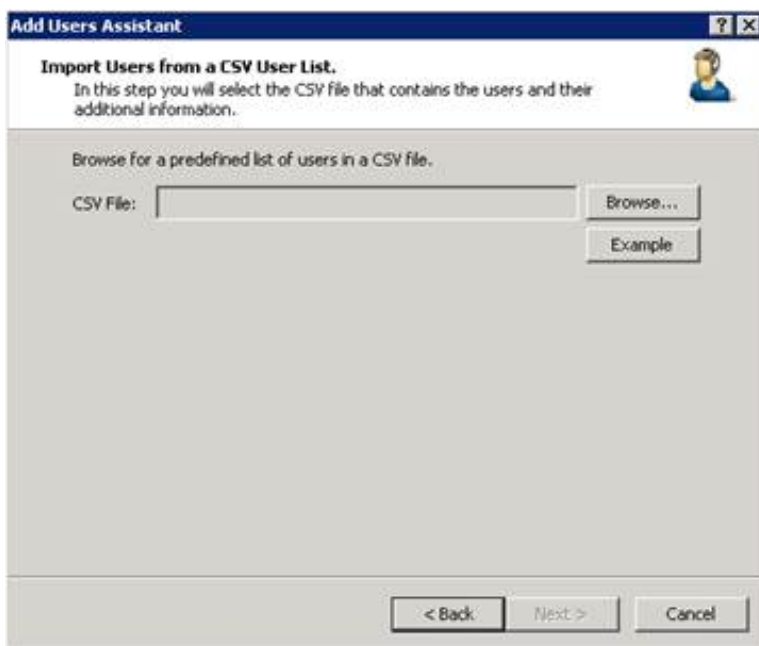

The **Welcome** page of the Add Users Assistant wizard appears.

2. Click **Search for new users** and then click **Next**. The **Search Options** page appears.

3. Click **Import users from a CSV user list** and then click **Next.** The **Import Users from a CSV User List** page appears**.**

4. If you have not already done so, download the CSV user list file to a secure location on the CIC Server.
5. Click **Browse...**
6. Locate your CSV file on the CIC Server and select it. The path and file name appear in the **CSV File** box.
7. Click **Next**. If the wizard encounters errors while parsing the CSV file, a warning message appears.
8. To view the status and description of the errors, click **Errors**.

- **Warning** error: Add Users Assistant cannot verify one or more values. You can continue with the import, but some of those values won't import.
- **Severe** error: Add Users Assistant detects no columns in the file or it couldn't open the file. You cannot continue with the import.

9. Correct the errors in the CSV file and then click **Next** to continue with the import. The **Set Extensions for IC User Accounts** page appears.
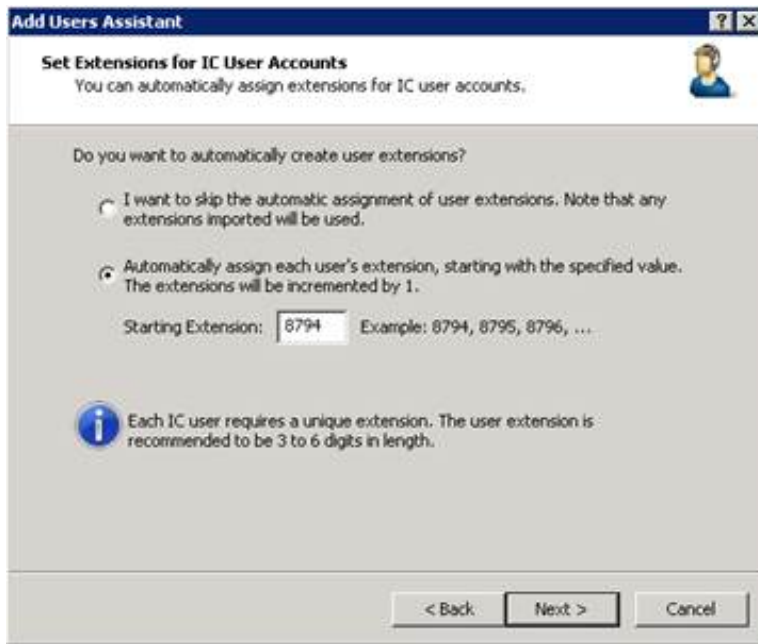
10. Do one of the following:

- To create user extensions automatically, click **Automatically assign each user's extension, starting with the specified value** and then specify the starting extension number.
- To skip the assignment and use the imported extensions, click **I want to skip the automatic assignment of user extensions**.

11. Click **Next**. The **Set Passwords for IC User Accounts** page appears.


> **Note:** For security reasons, Genesys recommends that you use the Set Password feature after the user import; however, you can choose to assign a single password for each new user.

12. Click **Next**. The **Preview Import Results** page appears.
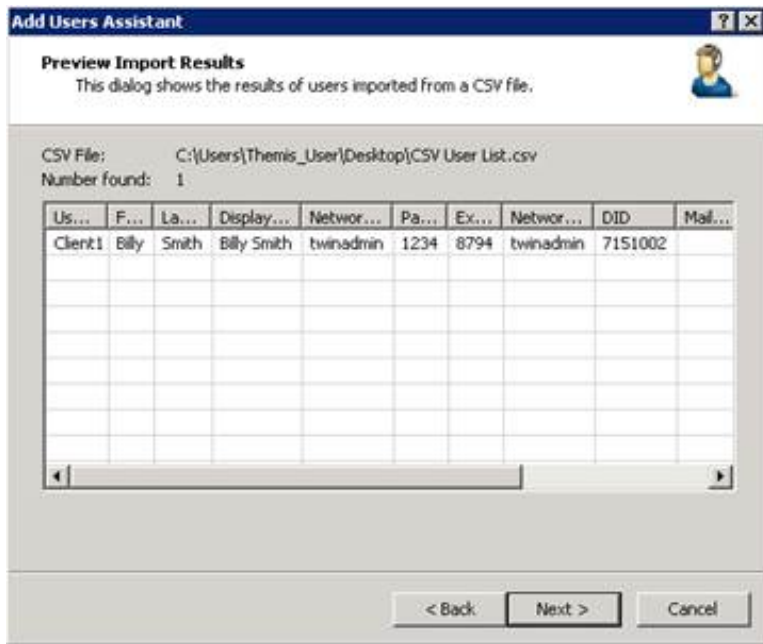
13. Review the results of the imported CSV user list and then click **Next**. The **Completing the Add Users Assistant** page appears.
14. Click **Finish**. The **User Worksheet** appears, which allows you to add more users, modify user attributes, or delete users.
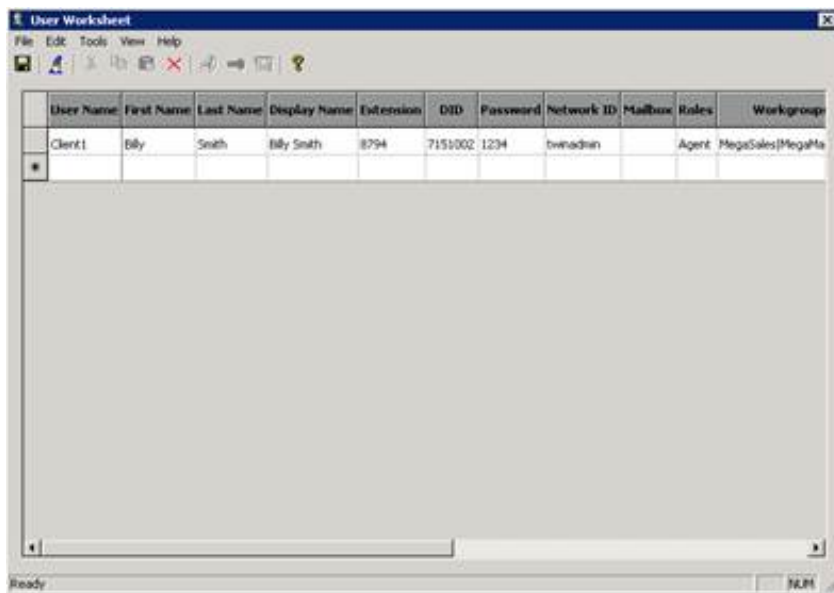
15. To add, modify, or delete a user, do the following:

    - To add a user, type the user attributes in a blank row in the data grid.
    - To modify a user, type over the text in the cell of the user attribute to modify.
    - To delete a user, click the user row and then, in the toolbar, click the Delete icon.

16. Save your changes and close the worksheet.

    Note: You can also run the **Add Users Assistant** again.

Change Log

The following table lists the changes to this document since its initial CIC 4.0 release.

Date	Change
01-May-2012	Updated all screen shots and removed note about required licenses.
27-January-2014	Updated "Create CSV Managed IP Phone list(s)" for AudioCodes phones, available in IC 4.0 SU 5.
12-August-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Product Information site URLs, and copyright and trademark information.
4-September-2015	Updated documentation to reflect rebranding and the removal of Interaction Client .NET Edition in CIC 2016 R1.
23-March-2018	Rebranded to Genesys.
19-December-2018	Updated for the addition of Genesys phones.
23-May-2019	Reorganized the content only, which included combining some topics and deleting others. For more details, see CICDOC-191.