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# **GENESYS**

## **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.

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## **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 <u>multiple "non-managed" SIP stations</u> by importing a CSV list containing SIP station information in Add Stations Assistant in IC Setup Assistant or Interaction Administrator.
- Create <u>multiple managed IP phones and associated SIP stations</u> by importing a CSV list containing IP phone information in Managed IP Phones Assistant in Interaction Administrator.
- Create <u>multiple users</u> 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  $\Lambda$  ditional FilesCSV 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.

ganize 🔻 New	folder			) 🏦 🔹 🛄
Favorites	Name =	Date modified	Size	Туре
E Desktop	GSV Managed IP Phone List-Template.csv	8/12/2014 3:23 AM	1 KB	Microsoft Excel
👔 Downlaa	CSV Managed IP Phone List-Template.xlsx	8/12/2014 3:23 AM	10 KB	Microsoft Excel
上 public (n	CSV Managed IP Phone List-TMM.csv	8/12/2014 3:23 AM	1 KB	Microsoft Excel
上 builds (ić	CSV Managed IP Phone List-TMM.xlsx	8/12/2014 3:23 AM	13 KB	Microsoft Excel
S Recent f	CSV SIP Station List.csv	8/12/2014 3:23 AM	1 KB	Microsoft Excel
Therefore	CSV SIP Station List.xls	8/12/2014 3:23 AM	25 KB	Microsoft Excel
Libraries  Documer	CSV User List.csv	8/12/2014 3:23 AM	1 KB	Microsoft Excel
Documen	CSV User List.xls	8/12/2014 3:23 AM	22 KB	Microsoft Excel
Computer				
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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:

- <u>Create a SIP Station CSV list</u>
- 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.

8	Home		Lavout	SV SIP Station	Data Review					Q - 0	
P		rial ~ 10	· · · · · · · · · · · · · · · · · · ·	E B B -	General • \$ • % • *28 +28 Number G	Condit	tional Forma t as Table *		Prinsert * Polete * Format * Cells	∑ - → Sort & Find & 2 - Filter - Select - Editing	
	Al	- 6	and the local division of the local division	ame					an chronyth	1	3
	A	В	С	D	E		F	G	н		T
1	Name	Туре	Extension	Identification	Connection Ad	dress	Manufactu	Model	MAC Addres	s Machine Name	7
2	SIPPhone1	Workstation	5556	5556			Polycom	IP600	10111213141	A SIPPhone1Machine	e
3	SIPPhone2	Workstation	5557	5557	sip:5557@ <se< td=""><td>rver&gt;:5060</td><td>Polycom</td><td>IP500</td><td>10111213141</td><td>1B SIPPhone2Machine</td><td>e</td></se<>	rver>:5060	Polycom	IP500	10111213141	1B SIPPhone2Machine	e
4	SIPPhone3	Stand-alone Pho	5559	5659	10 100		Polycom	IP600	10111213141	IC SIPPhone3Machine	e
5	SIPFax1	Stand-alone Fax	5558	5558			Polycom	IP300	10111213141	ID	1
6											1
4	+ + H CSV	SIP Station List	195				1.4	-	H	¥	T
Rea	edy						Count	· • •	100%	• • •	

The following table provides descriptions of each attribute.

Attribute	Description
Name	Type the station name (required).
Туре	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 postinstallation 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:

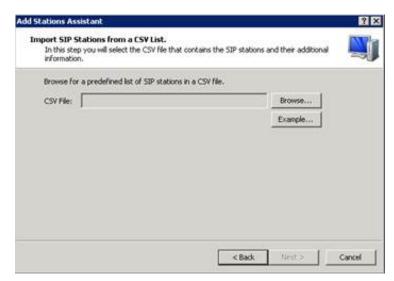
1. Run IC Setup Assistant.

Station Name	Туре	Connectio	Connection	Exten
	There are	no items to display.		

2. In the **Configure Stations** dialog box, click **Configure Stations**. The **Welcome** page of the Add Stations Assistant wizard appears.

Add Stations Assistant		? X
°0°	Welcome to the Add Stations Assistant. This assistant will guide you through the creation of multiple IC Stations.	
<mark>ទ</mark> ំGENESYS <sup>-</sup>		
	< Box. Next > Co	incel

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.

d list of SIP stations in a CSV	file.	
ations.csv		rowse
	E	xample
is OK. Click Next to continue	2	
	ations.csv	ations.csv

- 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.

Station Name	Туре	Ex.,,	Identificati	C.,	Manufa +
a de like gevenne ser ser i	Workstation	7186	sg-clay8-7186		Polycon
Suffrance in Suffrance	Workstation	7780	sg-clay8-7780		Polycorr
rund until	Workstation	7781	sg-clay8-7781		Polycor
And a second sec	Workstation	7451	sg-clay8-7451		Polycom
41911895	Workstation	7259	sg-clay8-7259		Polycon
and the second s	Workstation	7640	sg-clay8-7640		Polycom
BL LOCKET-	Workstation	7609	sg-clay8-7609		Polycon
100000-00000-0000-000-000-000-000-000-0	Workstation	7495	sg-clay8-7495		Polycom
100.0000000	Workstation	7174	sg-clay8-7174		Polycom
CONTRACTOR OF STREET	Workstation	7538	sg-clay8-7538		Polycom
NUMBER OF TAXABLE	Workstation	7066	sg-clay8-7066		Polycorr +
d		1			+

- 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.

elect the dial plan classifical	ions to add.			
Available Blocked Emergency Information Intercom	Add -		ected	_
International Local Operator Long Distance SIP TEL Tol Free	Add Al	->		

**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.

Add Stations A	Assistant	? ×
	Station Data ready to commit your changes?	N)
0	Click the Commit Changes button to start saving your con Commit Changes	figuration.
	< Back	Next > Cancel

14. Click **Commit Changes**. The system saves your station configuration and the **Station Licenses** page appears.

Station Licenses Your stations have been adde Do your stations need licensin		
Basic Station License	Additional Licenses	
Clerk Access ACD Access License G. Media 1 C. Media 2 C. Media 3 Rus PA License C. Direct Routed Work Dems C. Group Routed Work Dems	Interaction Feedback Access Interaction Recorder Access Interaction Recorder Access Interaction Dialer Add-On Interaction Scripter Interaction Supervisor Plug-In: System Status Interaction Supervisor Plug-In: Workgroup Interaction Optimizer Clent Access Interaction Optimizer Clent Access Interaction Supervisor Plug-In: Reporting Assistant	

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

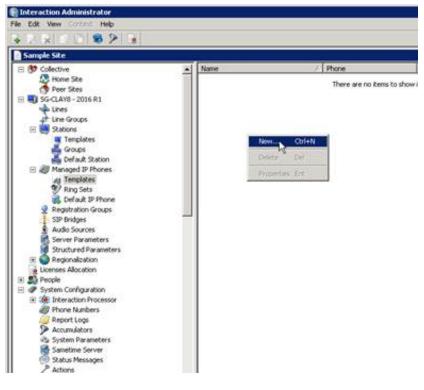
We recommend that you plan the IP phone configuration you want for your CIC system. If it is appropriate for your site, create one or more managed IP phone templates based on your planning decisions. For example, you can create separate templates for the following situations:

- 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.

New Managed IP F	Phone Template	? ×
Name:	My Polycom Agent Template	
Type:	Workstation	•
Manufacturer:	Polycom	•
Model:	IP600	•
	ОК	Cancel

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.

ame:		My Polycom Agent Template	Bro	wse	Active
egistr	ation Group:	<default group="" registration=""></default>	•		
ocatio	n:	<default location=""></default>	-		
irmwa	re <u>V</u> ersion:	<latest> (3.1.6)</latest>	-		
ime Zo	ne:	Use Location Time Zone	_		
0008778		(UTC-05:00) Eastern Time (US &	Canada)	¥	
h n h Grani	Appearances:	A second s			
_	Label	Station			A.44
Key	LaDer	(Station)			Add •
2	[Unassigned]	T WINNER P			Edt
3	[Unassigned]				
4	[Unassigned]				Remove
5	[Unassigned]			100	-
6	[Unassigned]				
					Move Up
				10	
					Move Down

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.

**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.

Sample Site	and a second		
Collective Home Size Peer Sizes Size-CLAIT - 2036 R1 Lines Stations Stations Templates Groups	None     My Polycom Agent Yes	A Phone Inductor Polycom (P600	Access Control Group
Default Station     Managed IP Phones     Age Templates     Sing Sets     Default IP Phone     Program Station Groups Polycom Agent Templates saved.			2. sp-day6.usar

#### 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:

- <u>Create a CSV Managed IP phone-Template list</u>
- <u>Create a CSV Managed IP phone-TMM list</u>

#### 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.

4	A	B	C	D	E	F	G	1
i.	Name	Template	Proxy Group	Extension	Identification Address	Label	Address	Ĩ
	PolycomLobby1	My Polycom SA Template		7101		Lobby	0004F2AABBCC	ļ
	PolycomAgent1	My Polycom Agent Template		7201		Line1		
	AgentSSP-PC1	My Agent SSP Template		7301			AgentPC1.lab.local	
	AgentISS1	My Agent ISS Template		7401			0026FD0095FD	
5	Agent420HD	My Agent 420HD Template		7501			00908F123456	
1	CSV Manag	ed IP Phone List-Templ			841	1.84		n

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 <b>Name</b> 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 <b>My Computer &gt; Properties &gt; Computer Name</b> and note the <b>Full Computer Name</b> . For <b>example:</b> 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:

4	A	8	C	D	E	F	G
C,	Name	Template	Proxy Group	Extension	Identification Address	Label	Address
ł.	PolycomLobby1	My Polycom SA Template		7101		Lobby	0004F2AABBCC
8	PolycomAgent1	My Polycom Agent Template		7201		Line1	
ĺ.	AgentSSP-PC1	My Agent SSP Template		7301			AgentPC1.lab.local
5	Agent15S1	My Agent ISS Template		7401			0026FD0095FD
5	Agent420HD	My Agent 420HD Template		7501			00908F123455
1	CSV Manag	ed IP Phone List-Templ 🦯 😏 🧷			1141	18	1 31

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.

with white when the state of the state		
File Edit Format View Help		
PolycomLobby1,My Polyco PolycomAgent1,My Polyco AgentSSP-PC1,My Agent S AgentISS1,My Agent ISS	up,Extension,Identification Address,Label,Address m SA Template,,7101,,Lobby,0004F2AABBCC m Agent Template,,7201,,Line1, SP Template,,7301,,,AgentPC1.lab.local Template,,7401,,0026FD0095FD HD Template,,7501,,,00908F123456	

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.

-	A	8	c	D	E E	F	6	H	mul
1	Name	Туре	Manufacturer	Model	Proxy Group	Extension	Identification Address	Label	Address
2	PolycomLobby2	Stand-alone Phone	Polycom	1P330		7102		Lobby	
3	PolycomAgent2	Workstation	Polycom	IP601		7202		Line1	0004F204F6A9
4	AgentSSP-PCJ	Workstation	ININ	Soft Phone	Remote Agent SSP - TLS	7302	7302		
5	Agent1552	Stand-alone Phone	ININ	Interaction SIP Station	Remote Agent ISS - TCP	7402	7402		0026FDF00020
6	Agent 420HD	Stand-alone Phone	AudioCodes	420HD		7502	7502		00908F123456
7.	A.H. CSV Manag	ed IP Phone List-TMM	HodeDeformation	10	84			_	
Rei	10/						CALL COL LANS	0	0.0

The following table provides descriptions of each attribute.

Attribute	Description
Name	(Required) Type the name of the IP phone.
Туре	(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 <b>Name</b> 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 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:

1	A	8	C	D	E	F.	6	H	the second second	1
1	Name	Туре	Manufacturer	Model	Proxy Group	Extension	Identification Address	Label	Address.	T
2	PolycomLobby2	Stand-alone Phone	Polycom	1P330		7102		Lobby		1
з	PolycomAgent2	Workstation	Polycom	IP601		7202		Line1	0004F204F6A9	
4	AgentSSP-PC2	Workstation	ININ	Soft Phone	Remote Agent SSP - TLS	7902	7302			
5	Agent1552	Stand-alone Phone	ININ	Interaction SIP Station	Remote Agent 155 - TCP	7402	7402		0026FDF00020	ŧ.
6	Agent420HD	Stand-alone Phone	AudioCodes	420HD		7502	7502		00908F123456	
7.						20200	2015			2
	B. H. CSV Manag	ed IP Phone List - IMP4	/ Hodelbromation	1997 - Contraction - Contracti				-	100 C	12
84	W)						110 28 (11 100%)	(C)		

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-TMMcsv - Notepad	. 🗆 ×
File Edit Format View Help	
Name,Type,Manufacturer,Model,Proxy Group,Extension,Identification Address,Label,Address >olycomLobby2,Stand-alone Phone,Polycom,IP330,,7102,LLobby >olycomAgent2,WorkStation,Polycom,P600,,7202,LineL,0004F204F6A9 NgentSSP-PC2,WorkStation,ININ,Soft Phone,Remote Agent SSP - TLS,7302,7302,, AgentISS2,Stand-alone Phone,ININ,Interaction SIP Station,Remote Agent ISS - TCP,7402,7402,0026FDF0002 Ngent220HD,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.

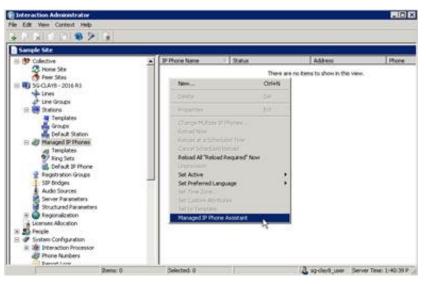
#### Create managed IP phones with Managed IP Phone Assistant

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 <u>CIC Managed IP</u> <u>Phones Administrator's Guide</u> and <u>PureConnect Installation and Configuration Guide</u>.

**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.

additional information.		(i	
CSV File:		Example	

- 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.

elect the dial plan classification	is to add.		
Available		Currently Selected	
Elocked Emergency Information Intercom Intercom International Local Local Operator Local Operator Local Operator Elocal TEL Toll Free Unione	Add :> <- Remove Add All -> <- Remove A		

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.

anaged IP Phone	Assistant	?
Saving manag Are you rea	ed IP phones by to commit your changes?	<u>n</u>
نې ا	ick on the Commit Changes button to start saving your Commit Changes	configuration.
	< Back	] light > Cancel

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.

Station Appereance Licenses Your managed IP phones have Does your station appearance	been created with 1 station appearance. need licensing?	<u>U</u>
Basic Station License	Additional Licenses	
Client Access ACD Access License C Media 1 C Media 2 C Media 3 Plus IPA License C Direct Rooted Work Items C Group Routed Work Items	Interaction Feedback Access Recorder Access Dialer Add-On Interaction Scripter Add-On System Status Supervisor Plug-In Workgroup Supervisor Plug-In Dialer Supervisor Plug-In Optimizer Thin Client Plug-in Optimizer Supervisor Plug-in Report Assistant Supervisor Plug-In 4	4 

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.

File Edit. View Context Help	3172								.iei.
- 1 S I S 8 2 G		_							
E 😏 Collective		IF Phone Name	2.84	Address	Phone	Software version	Active	Location	Tese 2or
C Home Site	100	PolyconLobby2	Not provisioned		Polycon IP330		Yes	<default location=""></default>	
Peer Stes		PolyconAgent2	Not provisioned	00.01/72.01/16.49	Polycon IP601		Yes	<defailt location=""></defailt>	
🗄 🖏 PROTEUS - 4.0 SUS	1	Agent55P-PC2	Not provisioned		2NDV Soft Phone		Yes	<default location=""></default>	
- Lines		Ager#1952	Not provisioned	00/26/P0/P0/00/20	2NIN Interaction SIP Station		Yes	<default location=""></default>	
🕂 Une Groups	1	Agent420HD	Not provisioned	00/90/05/12:34:56	AudoCodes 420HD		Yes	<default location=""></default>	
E Stations									
III 40 Managed IP Phones									
Ag Templates Pring Sets									
Default P Phone									
Registration Groups									
SIP Bridges									
Audio Sources									
Server Parameters									
Structured Parameters									
F 🚳 Regionalization									
Licenses Allocation									
B S Peucle	-1	-1				- F.			

- 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.

abel:	Call Forwarding		Custom Attributes	History
interfication Address:     7502     Image: Auto Conference PIN:       interfication Address:     7502       interfication Address:     Image: Auto Conference PIN:       interfication Address:     Image: Auto Conference PIN:	Configuration	Licensing	Access Control	Station Options
Identification Address: 7502 Line Keys: 1 * Calls per Line Key: 1 *	.abel:	Agent420HD		
Line Keys: III Calls per Line Key: III Connection Address: Not registered	Extension:	7502	Auto Conferen	nce PIN:
Calls per Line Key: 1	Identification Address:	7502		
Connection Address: Not registered	Line Keys:	1 -		
	Calls per Line Key:	1 *		
		8 0.74 8	e on the managed IP phone '	'Agent420HD."

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.

- <u>Create a User CSV List</u>
- 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.

	Ble Edit Vie	w Insert	Format Ic	ols Data	Window Help	Adobe PDF		Type a question	for help	ð x
	BAIAI	1 ĝi	Arial		- 10 -	B I ∐   ■	<b>* 1</b> 3	\$% 彈	🗄 • 💁 • 🗛 •	
8	2203	<ul> <li>(1)</li> <li>(1)</li></ul>	日間日	(1) TUN	echy with Chang	es. Epd Review	-			
6		G Q Fan	orites • Go	· 🗟 🖸	Documents and	Settings\sonyam\Loca	Settings\Ten	porary Inte 🗉 📕		
	L1 -	the second se	tation Nam							
					-					
	D	E	F	G	H	1.1	J	K	L	100
1	D Display Name	E Extension	F DID	and the second	H Network ID	Mailbox	J Roles	K Workgroups	L Station Name	-
1 2	Contractor and the second second	and the second se		Password	Construction of the second second	Mailbox SMTP:ictwin@t		Workgroups	L Station Name geminitwin	*
1 2 3	Display Name	Extension	DID 7151001	Password 1234	Network ID	and the second sec	Supervisor	Workgroups Support	geminitwin	1
1000	Display Name John Doe	Extension 1001	DID 7151001 7151002	Password 1234 1234	Network ID ictwin	SMTP:ictwin@t	Supervisor Agent	Workgroups	geminitwin Guest01	1

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	<ul> <li>Type the role that users should be assigned. It must be one of the following roles:</li> <li>Administrator</li> <li>Agent</li> <li>Business User</li> <li>Operator</li> <li>Billable-Time User</li> <li>Supervisor</li> <li>Mobile Office User</li> <li>These roles each have certain associated dialing privileges, such as Long Distance calling and Emergency dialing.</li> <li>See "Default Roles" for more information.</li> <li>IC Setup Assistant automatically assigns the Operator Role to the default Company Operator.</li> <li>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.</li> </ul>
Workgroups	Type the names of the workgroups the user should belong to. After the CIC installation, you can further define the workgroups in the <b>Interaction Administrator Workgroups</b> 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.</null>

**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.

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	Х	х	Х	x	x		
Show Disconnect Button	Х	x	Х	x	x		
Show Hold Button	Х	x	Х	х	x		
Show Transfer Button	Х	x	Х	х	x		
Show Voice Mail Button	X	x		х	x		
Show Listen Button	х	x					
Show Record Button	х	x		х	х		
Show Pause Button	х	х		x	х		
Show Mute Button	х	х	Х	х	х		
Show Private Button	х	х			х		
Show Assistance Button	х		Х	х			
Show Join Button		х					
Show Coach Button		х					
Customize CIC Client	х	х		х	х		
Record Calls	х	х		х	х		
Listen in on Calls	х	х					
Private Calls	х	x		х	х		
Publish Handlers	x						
Manage Handlers	х						
Debug Handlers	х						
Allow Workgroup Alerts	х	х					
Allow Workgroup Queue Alerts	Х	х					
Allow Handler Trigger Alerts							
Remote Control							
Trace Configuration	х						

Follow Me	Х	Х		х	x		
Account Code Verification	Х	х	х	Х	Х	х	Х
IP Phone Provisioning Admin	Х						
Allow Workgroup Statistics	Х	х					
Require Forced Authorization Code	Х						
Use TIFF for Faxes	Х						
Allow Video	Х						
Allow User Defined Telephone Number on Remote Login	Х	x	x	Х	x	x	х
Allow Persistent Connections	X						
Allow Supervisor Message Creation	Х						
Allow Intercom Chat	Х						
Allow Monitor Columns	Х	х	x	Х	Х	х	Х
Allow to Receive Voicemail	Х	х	x	x	x	х	х
Allow Voicemail Access Via TUI	X	x	x	x	x	x	x
Allow Fax Access Via TUI	X	х	x	x	x	x	x
Allow Email Access Via TUI	X	x	х	Х	x	x	Х
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 - inherite d	*ALL - inherite d	*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				

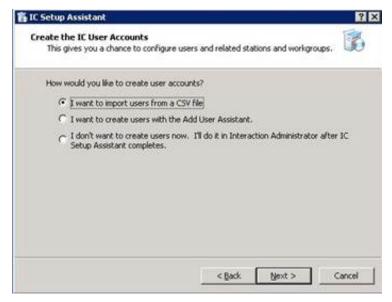
\*ALL = All items in the Access Control category are assigned by default.

#### 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.

Setup Assistant		3
Import Users from a CSV User List. In this step you will select the CSV file to additional information.	hat contains the users and their	
Browse for a predefined list of users in	a CSV file.	
CSV File:	Brows	se

- 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.

User Name	Display Name	First Name	Last Name	Extension	Password
EICBuikCaller	John Doe	John	Doe	1001	1234
Client1	Billy Smith	Billy	Smith	1002	1234
Client2	Betsy Adams	Betsy	Adams	1003	1234
Jasper_user					53517
Operator					53517
4					)

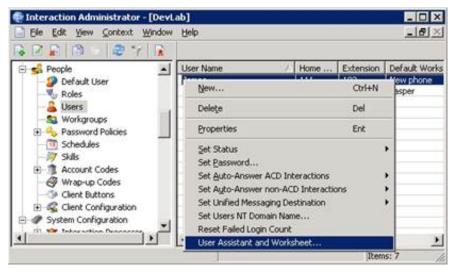
IC Setup Assistant adds the required user accounts to IC Administrator and the default Company Operator.

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.

Add Users Assistant	2 ×
	Welcome to the Add Users Assistant.
_0	This assistant will guide you through the creation of multiple IC Users. Users can be discovered from your mail servers, Windows, or can be imported from a CSV file.
Q	Once finished you have the option of modifying user entries within the worksheet.
0	To continue, choose an option and click.Next.
	Options:
	Search for new users
1.0	C Skip the search and add or modify user entries within the worksheet
Senesys.	
	Cancel

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

Search Options	ning hour career call k	a lacated	2
The option chosen will deten	mine now users will b	ie located,	-
How do you want to search l	for users?		
C Discover mail server u	isers		
C Discover Windows use	ers		
Import users from a C	SV user list		

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

at contains the users and their
CSV file. Browse
Example

- 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.

d Users Assis	tant					2
	ons for IC User sutomatically assig		T	Cuser accor	ints,	2
Do уоц ии	ant to automatica	ily create	user exte	insions?		
C I w	ant to skip the au tensions imported	tomatic a will be us	issignmenl ied.	t of user ex	tensions. Note	that any
(* Au Th	tomatically assign e extensions will b	each use se increme	r's extens ented by 1	sion, startin 1.	g with the spec	fied value.
Re	arting Extension:	8794	Examp	le: 8794, 87	795, 8796,	
	ch IC user requir commended to be				r extension is	
			j	< Back	Next >	Cancel

- 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.

The IC Setup Assistant can au	counts to the count of the coun
Do you want to automatically a	assign user passwords?
<ul> <li>I want to skip the auton passwords imported will</li> </ul>	natic assignment of user passwords. Note that any I be used.
C Assign a single passwor	d for each new user account.
Password.	
	, we recommend against setting a single password for
in Add Users Assistan	elect the first option to skip user password assignment nt. Following the IC installation, open the Interaction
	container and select all users with valid email mailboxes.
Right-click and select	t "Set Password", and select "Generate and email
	t "Set Password", and select "Generate and email
Right-click and select	t "Set Password", and select "Generate and email
Right-click and select	t "Set Password", and select "Generate and email
Right-click and select	t "Set Password", and select "Generate and email

**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.

SV File: lumber f			sers\Themis	_User\Deskto	op(CSV)	User Lisi	t.csv		
Us	F	La	Display	Networ	Pa	Ex	Networ	DID	Mail
Client1	Billy	Smith	Billy Smith	twinadmin	1234	8794	twinadmin	7151002	
•									

- 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.

, Snith Billy Snith 8754 7153002 1234 twinadium Agent MegaSales(MegaM	•	Clent1	Billy	Smith	Billy Smith	8704	ESCORT.	1001/07	1		
	•	· · · ·				07.34	7151002	1234	twinadhin	Agent	MegaSales(Megah

- 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.