

IMPORT A CSV FILE WITH USER INFORMATION USING PM

You can import users, extensions and mailboxes via a CSV file using PM and the subsystem CMG. For more information of the contents in CSV file, see QRG Edit CSV file.

Note! The PM and CMG use different term for the same meaning, department or unit.

LOG IN TO PM

Do as follows:

1. Open **Provisioning Manager (PM)**. The start page is displayed.
2. Type the **User name** in the field **User**.
3. Type the **Password** in the field **Password**.
4. Click **Login**. The main page is displayed.

PREPARATION BEFORE THE IMPORT OF THE CSV FILE

You have to enter information about the company and the units before you can import the information in the CSV file. You have to enter the company name in PM and the company (organization) structure in CMG. **Note!** The structure in CMG has to be exactly as the structures in the CSV file and the usage of capitals have to be the same.

Do as follows:

1. Click **Users** and then **Departments**. The **Departments** page is displayed.
2. Change the name in the field **Department Name**.
3. Click **Apply**.

LOG IN TO CMG

Do as follows:

1. Click **System, Subsystem** and then **CMG DM**. The **Start** page is displayed.
2. Type the user name in the field **User name**.
3. Type the password in the field **Password**.
4. Click **Log in**. The **CMG Directory Manager** page is displayed.

ENTER COMPANY STRUCTURE IN CMG

It is important that a valid company structure is entered in CMG before you import a CSV file! When you enter information in CMG you have to end all setting with a click on the **Save** button.

Do as follows:

1. Select **All COMPANY01** from the list **Select Directory**.
2. Under **Organization** select **Company01**. The **Manage Organization** page is displayed.
3. Under **Organization** type the new organization name.
4. Click **Save**.

ADD A NEW UNIT IN CMG

Do as follows:

1. **Select the new organization under Organization**. The **Manage Organization** page is displayed.
2. Click **New Unit**. The **New unit** page is displayed.
3. Type the name of the unit in the field **Organization**.

4. Click **OK**, and then click **Save**. The new name is inserted in the structure.
5. Continue to enter all the other units to the structure. **Note!** It is important that the structure is the same as the information in the CSV file!

IMPORT THE CSV FILE IN PM

Do as follows:

1. Select **System, Data Management** and then **Import**. The **Import Data** page is displayed.
2. Click **Import**. The **Import Data -Step 1/4** is displayed.
3. Select **CSV file on A700** format for Aastra 700, and **CSV file** for MX-ONE.
4. Click **Next**. The **Import Data -Step 2/4** is displayed.
5. Click **Browse**. The **Choose File to Upload** page is displayed.
6. Select the file you want to import and click **Open**.
7. From the list **Character encoding of CSV file** select **ISO 8859-1**.
8. Click **Apply**. The file is now imported. **Note!** This can take a while.
9. Click **Done**. The **Import Data page** is displayed again. If the import was successful, you will get an information notice.
10. To check if all values are imported, click **Successful Items**. A list is displayed. Please read the whole list.

IF SOMETHING WENT WRONG

If something went wrong with the import, please check the list below.

CHECK LIST

- Check the user information.
- Check the structure of the organization in PM and CMG.
- Check user information in CMG.
- Check the use of uppercase and lowercase letters in the structure of the organization. It must be the same in PM and CMG.

CHECK THE ORGANIZATION STRUCTURE IN PM

Do as follows:

1. Click **Users, User** and then **Departments**. The **Departments** page is displayed.
2. Check the structure.

CHECK THE STRUCTURE IN CMG

Do as follows:

1. Click **System, Subsystem** and then **CMG DM**. The **Start** window is displayed.
2. Type the user name in the field **User name**.
3. Type the password in the field **Password**.
4. Click **Log in**. The **CMG Directory Manager** window is displayed.
5. Under **Organization** select the organization.
6. The structure is displayed to the right.
5. Check the structure.

SEARCH FOR A USER WITHOUT A UNIT IN CMG

Do as follows:

1. Open **CMG**. Click **Advanced Search** under **Records**. The **Advanced Search** page is displayed.
2. From the list **First criteria** select **Last name**.
3. Click **Search**. The **Record list** page is displayed.
4. Click **Organization** to sort the list.
5. Select the user. The user information is displayed. All users without a unit are displayed first in the list. You can now add users to the right unit.

ADD A USER TO A UNIT IN CMG

Do as follows:

1. Select a user. (Please see previous step-by-step-instruction **Search for a user without a unit in CMG**.)
2. Click the tab **Organization** and then **Add**. A page is displayed with the structure.
3. Expand the list.
4. Select a unit.
5. Click **OK**. The selected unit is displayed in yellow.
6. Click **Save**.

ADD A NEW UNIT IN CMG AFTER A CSV FILE IMPORT

If you find out that a unit is missing, you can add a new one in CMG.

Do as follows:

1. Under **Organization** select the organization. The **Manage Organization** with the structure page is displayed.
2. Select where in the structure the new unit shall be added.
3. Click **New Unit**. The **New Unit** page is displayed.
4. Type the required information of the unit in the fields.
5. Click **OK**.
6. Click **Save**.
7. Add users to the unit, see step-by-step-instruction **Add a User to a Unit in CMG**.