



This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

# eServices Manager Administrator's Guide

5/17/2026

# Table of Contents

<b>Get started</b>	
Get started with eServices Manager	4
<b>Standard Responses</b>	
Standard Responses	8
Plan and build a Category Tree	10
Create a Standard Response	16
<b>Field codes</b>	
Field Codes	23
Create and Insert Field Codes	26
Field Code Variables	30
Using Formulas in Field Codes	34
Field Code Examples	39
<b>Screening rules</b>	
Screening rules	43
Create and test screening rules	47
Screening Rule reference	57
<b>Managing and working with objects</b>	
Managing and working with objects	64

---

Search the table of all articles in this guide, listed in alphabetical order, to find the article you need.

**Related documentation:**

-

# Get started with eServices Manager



- Administrator

Learn how to get started with eServices Manager.

## Contents

- [1 Access the application](#)
- [2 What next?](#)

The eServices Manager Plug-in gives you the tools to:

- Respond to incoming interactions using pre-written Standard Responses.
- Customize the Standard Responses using Field Codes to add a personal touch.
- Create Screening Rules in order to screen interactions for specific words or phrases, which you can then use to decide how to handle the interaction.

## Access the application

The screenshot shows the Genesys Portal interface. At the top, there is a dark header with the Genesys logo and a question mark icon. Below the header, a greeting reads "User, welcome to your Genesys Portal". To the right of the greeting are navigation links: "All Apps", "User", "Administration", and "Support". The main area is a grid of application tiles, each with an icon and a label. The "Platform Administration" tile, which features a key icon, is circled in black. Other tiles include Agent Desktop, Workforce Management, Workforce Administration, Pulse Reporting, Callback, Reporting GCXI, Reporting Administration GCXI, Recording, Designer, Agent Setup, CX Contact, Data Download, Reporting, Reporting Administration, IVR Administration, Outbound, and Outbound Administration.

User, welcome to your Genesys Portal <span style="float: right;">All Apps User Administration Support</span>				
 Agent Desktop	 Platform Administration	 Workforce Management	 Workforce Administration	 Pulse Reporting
 Callback	 Reporting GCXI	 Reporting Administration GCXI	 Recording	 Designer
 Agent Setup	 CX Contact	 Data Download	 Reporting	 Reporting Administration
 IVR Administration	 Outbound	 Outbound Administration		

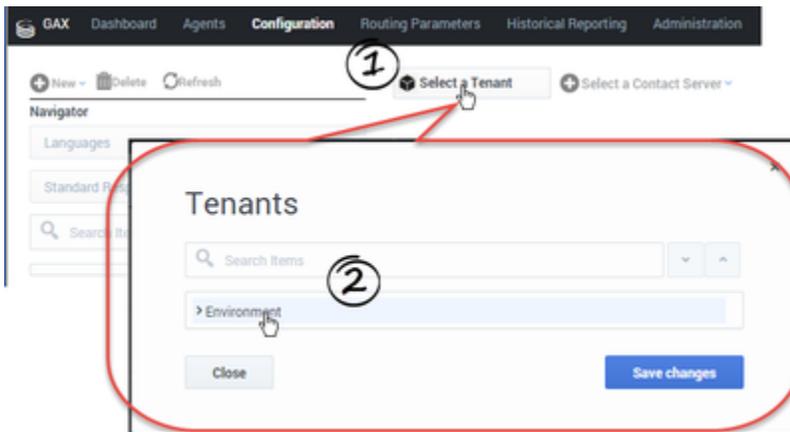
## Get started with eServices Manager

Once your Genesys Multicloud CX environment is up and running and you've checked that you meet the necessary requirements, log in to your Genesys Portal to access Platform Administration. Click the Platform Administration icon and enter your username and password.

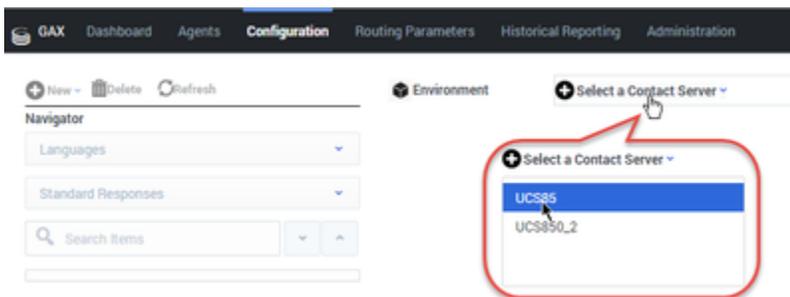
After you start Platform Administration, open the eServices Manager Plug-in:



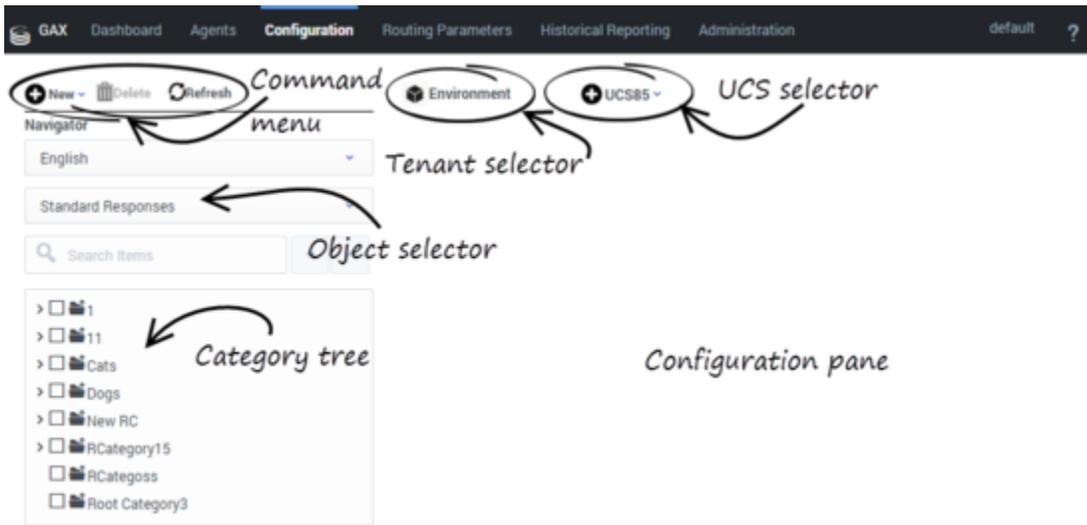
Now, select your Tenant...



and your Contact Server or Contact Server Proxy:



The eServices Manager window includes the following areas:



What next?

- Working with Standard Responses explains how to create and edit Standard Responses and how to create the category tree structure you will use to organize your Standard Responses, Field Codes, and Screening Rules.
- How to create and edit Field Codes, which enable you to insert personal information, such as names, into your Standard Responses.
- Working with Screening Rules explains how to create and edit Screening Rules, which enable you to analyse what incoming messages are about and to handle them accordingly.

# Standard Responses



- Administrator

Default responses, known as *standard responses*, enable you to send welcoming, helpful answers to frequently-submitted queries from customers.

## **Related documentation:**

- 

## Contents

- [1 Plan and build your Category Tree structure](#)
- [2 Create your Standard Responses](#)
- [3 Create Field Codes](#)
- [4 Manage Standard Responses](#)

This page provides a high-level overview of the steps to create Standard Responses and set them up for use.

### Plan and build your Category Tree structure

A Category Tree provides the framework for organizing your Standard Responses.

[Plan and build a Category Tree](#)

---

### Create your Standard Responses

Create the Standard Responses and set properties.

[Create a Standard Response](#)

---

### Create Field Codes

Create Field Codes and then add them to the Standard Responses. Field Codes enable you to personalize your Standard Responses.

[Field Codes](#)

---

### Manage Standard Responses

You can cut, copy, paste, and delete Standard Responses and other eServices Manager objects.

[Managing and working with objects](#)

---

# Plan and build a Category Tree

## Contents

- **1 Step 1: Planning**
  - 1.1 How category structures work
  - 1.2 Example Category Tree
- **2 Step 2: Build your Category Tree**
- **3 More about categories**
  - 3.1 Characters Allowed in Names
  - 3.2 Search the Category Tree
- **4 Next steps**



- Administrator

Plan and build a category tree to provide the hierarchy for your standard responses.

### **Related documentation:**

- 

A Category Tree consists of one or more *root categories*, each of which can have subcategories under it. Standard Responses are nodes under categories or subcategories in the Category Tree.

## Step 1: Planning

We'll start by planning your Category Tree. To make your Standard Responses useful, you need root categories and subcategories that make sense in your business.

For example, you might create root categories for business units such as Sales, Service, and Billing. Then create useful subcategories. You might want to separate out customer type, such as Platinum, Gold, and Silver customers; or maybe it would work better for you to separate types of products, such as Pet Food, Pet Toys, and Cleaning Supplies; or you might want to respond differently to customers in different locations.

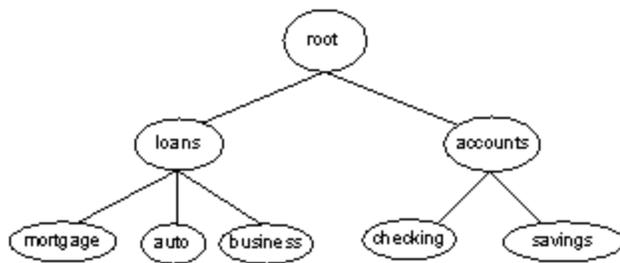
- Make sure that all the Standard Responses you need will fit within the categories you create.

### Tip

Plan your category structure ahead of time. You can edit it, but a little thought now will save time a frustration later.

## How category structures work

In general terms, a *category* is a unit of knowledge. Categories are organized in a tree structure; "Example Category Tree" shows an example.



## Example Category Tree

Genesys eServices uses category trees to organize and provide access to the library of standard responses. Each standard response must be associated with one category. One category can have zero or many standard responses associated with it.

Categories with no associated standard responses may be of use in grouping other categories together.

Note these definitions:

- A *terminal* category is one that has no subcategories: a leaf on the category tree.
- A *nonterminal* category is one that has subcategories.
- *Child* is another term for subcategory. For example, in "Example Category Tree", **savings** is a child of **accounts**, and accounts has the two children **checking** and **savings**.

A category tree is specific to a tenant and a language. Each tenant/language pair can have multiple category trees.

You can design different sets of screening rules (for example) for different languages within a single tenant. But the screening rules operate the same way regardless of which language they are grouped under.

Category membership is inherited. That is, if Category 1 includes Categories 10 and 11, and Category 10 includes Categories 100 and 101, then Category 1 also includes Categories 100 and 101.

## Step 2: Build your Category Tree

You've done your planning. Now let's make it happen. For our example, we are going to create two new root categories, Cats and Dogs, with subcategories, and sub-subcategories:

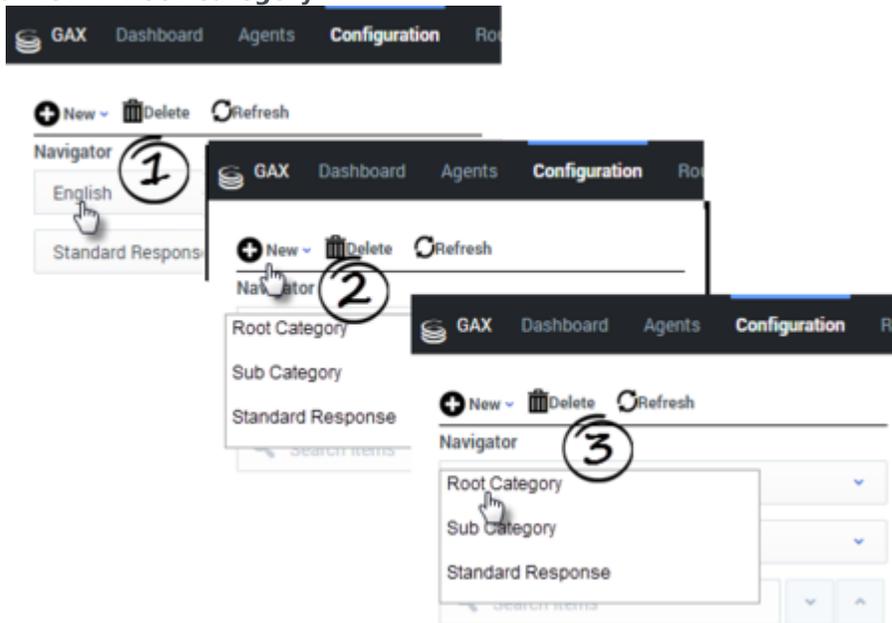
## Plan and build a Category Tree

---

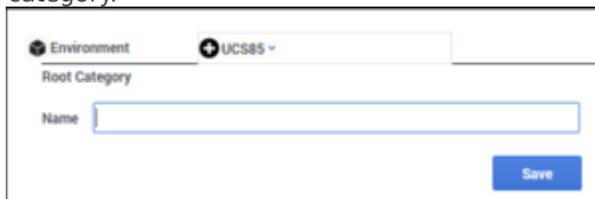


First, we'll create our two root categories:

1. Make sure you have selected the right Tenant and Contact Server.
2. Select the language. Note that in this release, the language choice does not affect how messages are handled.
3. Select **New > Root Category**.



4. Then enter the root category name, Cat, and click **Save**. Repeat the same process to create the Dog root category.



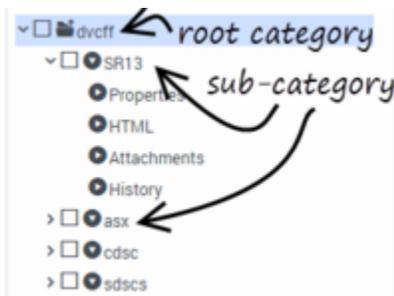
5. Now create the subcategories. For each subcategory, highlight the correct root category and then follow the same process as above, but select **New > Sub Category** instead of **New > Root Category**.

### Tip

You can cut, copy, paste, and delete categories as well as other eServices Manager objects.

## More about categories

- To change a category name, select it, edit the name in the text box, and click **Save**.
- To delete a category, check its checkbox and then click **Delete**.
  - Be careful to select only the category check boxes you want to delete!
  - Deleting an upper-level category also deletes all the categories under it.
- There is a special type of category called Service Category that the system may create for you.
- To open the root category and show the categories beneath it, click a caret mark (>).



## Characters Allowed in Names

### eServices Manager Objects

Names of categories, like those of all eServices Manager objects, can consist only of the alphanumeric characters supported in UTF-8, plus the characters shown in the following table:

Additional Characters Allowed in Object Names

Name	Character	Name	Character
Hyphen	-	Exclamation point	!
Number sign, pound	#	Dollar sign	\$
Caret	^	Asterisk	*
Underscore	_	Curly brackets	{ }
Angle brackets	< >	Period, full stop	.

Names can be no more than 64 characters long.

## Language Names

Names of the Business Attribute called **Language** can consist only of Latin characters and numbers (A-Z, a-z, 0-9), plus the characters in "Additional Characters Allowed in Object Names."

## Custom Variables

Names of custom variables can consist only of Latin characters and numbers (A-Z, a-z, 0-9).

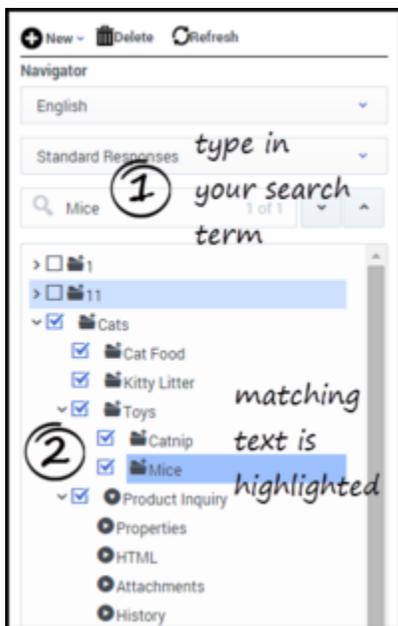
## Text Direction

The default direction for text is left to right. To change the direction, right-click the text field and select writing direction.

## Search the Category Tree

To locate a category, Standard Response, Field Code, or Screening Rule:

- Select the type of object you want to search for and then enter your search term.



## Next steps

- Creating Standard Responses
- Personalizing Standard Responses with Field Codes

# Create a Standard Response

## Contents

- [1 Process Overview](#)
- [2 Create a Standard Response](#)
- [3 Set the Standard Response properties](#)
  - [3.1 About the Active Parameter](#)
  - [3.2 About the Expiration Date](#)
- [4 Create the HTML version](#)
  - [4.1 Paste an already-configured response](#)
  - [4.2 Add an image](#)
- [5 Add attachments](#)
- [6 Create and manage multiple versions](#)
- [7 Field Codes](#)



- Administrator

Create standard responses that agents can use as automatic replies to emails, chats, social engagement, and SMS.

### Related documentation:

- 

A Standard Response is an item in the Standard Response Library, which stores prewritten responses for use as suggestions to agents, acknowledgments, and/or autoresponses. Each standard response is assigned to exactly one category in the system; however, a category may have zero or many standard responses assigned to it.

You can use Standard Responses for any of the Digital channels: email, chat, social engagement, or SMS.

It takes just a few steps to create a Standard Response. The Process Overview below lists the main steps. We'll take each one in sequence, or you can skip to the information you need right now.

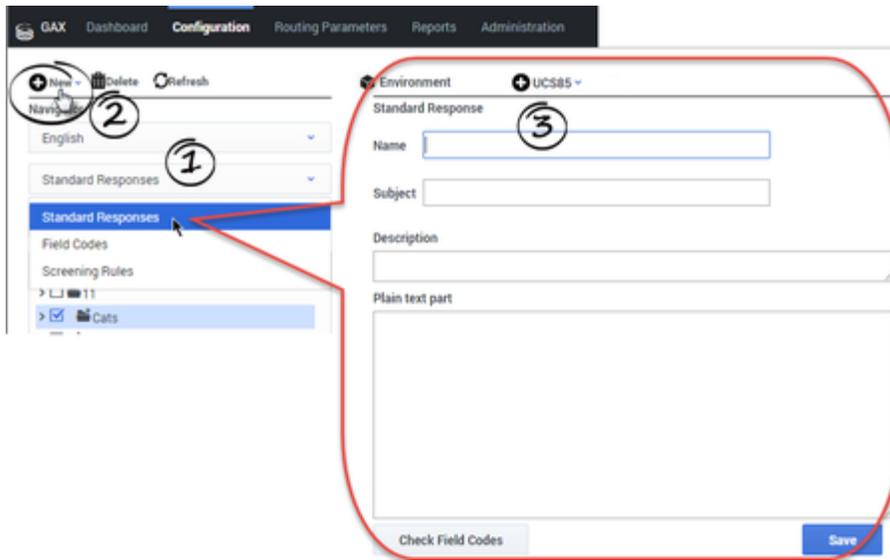
## Process Overview

1. Create a Standard Response
2. Configure the properties for your Standard Response
3. Create the HTML version
4. Add attachments
5. Create additional versions and retrieve prior versions
6. Create and add Field Codes

## Create a Standard Response

1. Select the correct Category Tree node, and then select **New > Standard Response**. The first Standard Response configuration page appears on the configuration pane.

## Create a Standard Response

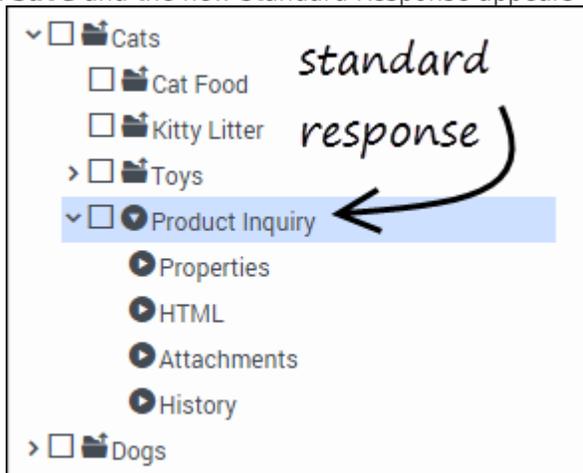


2. Enter the basic information for your Standard Response on the configuration pane.

### Important

The Standard Response name can consist only of alphanumeric characters (a-z, A-Z, 0-9), hyphen, underscore, and space. For more information about characters you can use in eServices Manager objects, see Characters Allowed in Names.

3. Click **Save** and the new Standard Response appears in the Category Tree.



4. To edit the standard response, select it, make your changes, and then click **Save**.

## Set the Standard Response properties

## Create a Standard Response

---

To configure the properties of your Standard Response:

- Click **Properties** under your Standard Response in the Category Tree to open the Properties configuration page.

The screenshot shows the 'Properties for Standard Response' configuration page. The page is titled 'Environment UCSB5' and 'for each usage'. The 'Usage' column has checkboxes for 'Acknowledgement', 'Autoreponse', and 'Suggestions'. The 'Active' column has checkboxes for 'Acknowledgement', 'Autoreponse', and 'Suggestions'. The 'for each usage' column contains text: 'type only ONE response can be Active; that is, it's the default response for that Usage type'. The 'Owner' field is 'default the response creator's username'. The 'Start Date' is '26 May 2015 by default, today's date'. The 'Expiration Date' is '26 May 2015 to enter an expiration date, clear the Never Expire check box'. The 'Never Expire' checkbox is checked. The 'Approved' checkbox is checked. A 'Save' button is at the bottom right.

The possible Usages are:

- Acknowledgment—The standard response may be sent to acknowledge receipt of an incoming interaction.
- Autoreponse—The standard response may be used as an automatic response to an incoming interaction.
- Suggestions—The standard response may be offered to agents as suggested wording to use in their own replies to interactions.

Each category in the Category Tree may have multiple standard responses of each Usage type.

### About the Active Parameter

For each Usage type, you must specify whether this standard response is the Active one. Only one standard response of a given Usage type can be Active. When the system needs to send a Standard Response of a specific Usage type automatically, it sends the one marked Active.

If you attempt to select Active for a Standard Response (either a new one or an existing one), and there is already an Active Standard Response with that usage type for that category, Knowledge Manager offers to take the previously Active Standard Response out of Active status.

### About the Expiration Date

If a standard response's expiration date has been reached, it has the following effects:

- The standard response is not shown in IRD, so it cannot be used in a new or modified strategy.
- If this standard response was saved in a strategy before the expiration date was reached, E-mail Server

## Create a Standard Response

---

does not send the standard response, but returns an error message.

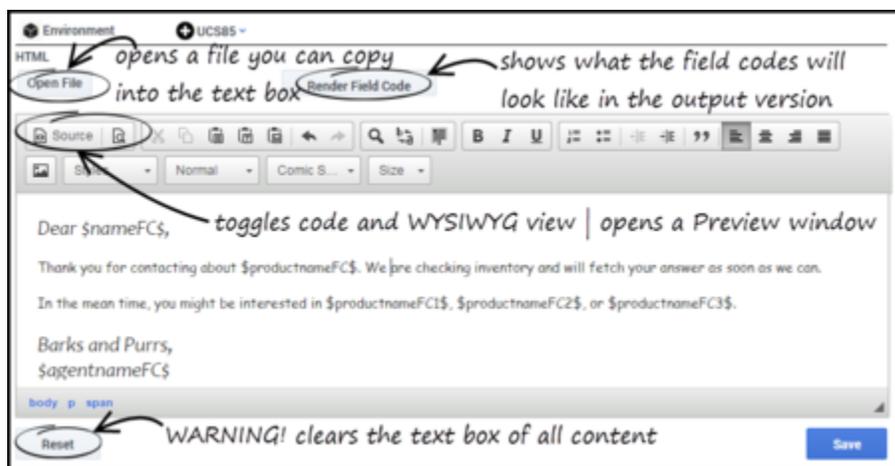
## Create the HTML version

To create the HTML version of your Standard Response:

- Click **HTML** under your Standard Response in the Category Tree to open the HTML configuration page. The plain text you entered appears automatically in the text box.

Most of the buttons provide commonly-used editing functionality, including the option to insert a link to an image. If you aren't sure what a button does, hover over it to open a tooltip.

The figure below explains buttons with more specialized functionality.



## Paste an already-configured response

You have a number of options for pasting content in from another document, including pasting:

- HTML code into the code view.
- Any text in as plain text.
- Formatted content from Microsoft Word.

### Important

- Links to resources that are used in the content, such as image files, must use absolute URLs; embedded graphics or relative links are not supported. Also, these resources must be available on the web through an HTTP server at the time that the standard response containing this HTML is sent to the customer.

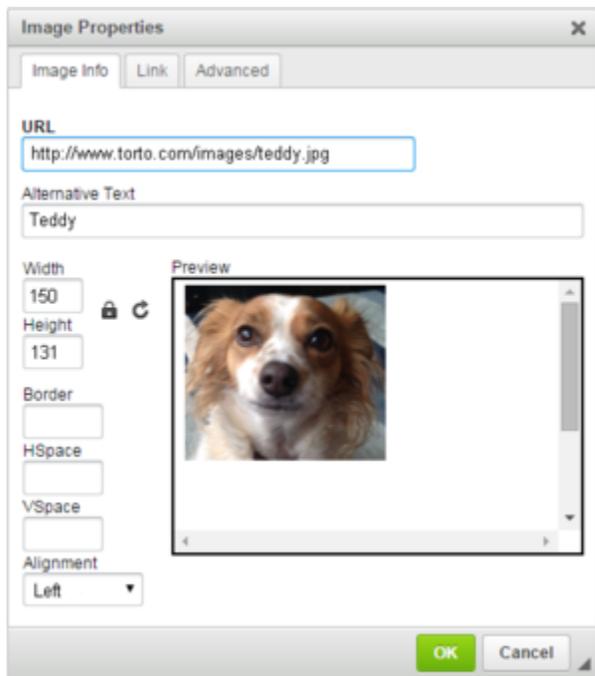
## Create a Standard Response

---

- Make sure that the content of the HTML version, including field codes, matches the plain text version that you created on the main configuration page tab. This is important because e-mail clients may display multipart e-mails in varying ways. For example, if Microsoft Outlook has AutoPreview turned on, the preview may show the plain text version whereas the full display shows the HTML version. For this reason you should be careful that the plain text and HTML versions have identical content.

## Add an image

To add an image, click the  button, then configure the dialog box that opens:



## Add attachments

To add an attachment to your Standard Response:

Click **Attachments** under your Standard Response in the Category Tree to open the **Attachments** configuration page.

## Create a Standard Response

---



- To add an attachment, click **Attach**.
- To remove an attachment, select it, then click the trash can icon.
- To view an attachment, select it, then click **Open**. This downloads the file to your environment.

## Create and manage multiple versions

To create multiple versions of your Standard Response:

Click **History** under your Standard Response in the Category Tree to open the History configuration page.



- When you save a new version, it retains everything except for attachments.
- After you save multiple versions, use the **Remove** and **Restore** buttons to manage them.
- To choose the version that appears on the Standard Response pane, select the check box for the version you want and click **Restore**.

## Field Codes

You will probably want to use Field Codes to personalize your Standard Responses. We'll be creating Field Codes after creating some Standard Responses, and then insert the Field Codes into them.

# Field Codes

## Contents

- [1 Field Codes Overview](#)



- Administrator

Create a wide range of field code types, which you can use to customize the standard response sent to a particular customer.

### **Related documentation:**

- 

Although Field Codes are used mostly in standard responses, they are the most complex and powerful aspect of standard responses, so they are described in this separate section.

eServices Manager enables you to create a wide range of Field Codes types, from simple Field Codes that function similarly to a Mail Merge-type word processor feature to complex Field Codes that include multiple objects, formulas, and constants (see Using a Complex Field Code for an example).

Once you create a Field Code, you can use it in multiple standard responses.

The interface for creating Field Codes is simple; creating really useful Field Codes requires a deeper understanding of how Field Codes can be constructed. How to Create and Insert Field Codes provides step-by-step instructions, with links to detailed reference information at the relevant places.

The reference information consists of the following topics:

- Field Code Variables
- Using Formulas in Field Codes
- Field Code Examples

### **Tip**

You can cut, copy, paste, and delete Field Codes as well as other eServices Manager objects.

## Field Codes Overview

The main use of field codes is to particularize standard responses.

For example, you can use the field code in a response beginning Dear , which you send to dozens of recipients. In each message, is replaced by the first name of the addressee of the message (the contact) as listed in the Universal Contact Server database.

More generally, a "field code" is a formula that you insert into an outgoing text object, such as an e-mail that E-mail Server generates when triggered to do so by a routing strategy object.

The most common type of such text object is a standard response (triggered by an Autoresponse or Acknowledgement object), but you can also insert field codes into other types, such as chat transcripts, SMS messages, and forwarded or redirected e-mails. In some cases, the only place you can insert a field code is in the Subject line using the **Format** tab in a strategy object.

The following is a complete list of the strategy objects that can use field codes either in a standard response or in the Subject line:

- Acknowledgement
- Autoresponse
- ChatTranscript
- Create EmailOut
- Create Notification
- Create SMS
- Forward
- RenderMessageContent

The following is a complete list of the strategy objects that can use field codes only in the Subject line:

- Redirect
- Reply from External Resource
- Send

When a text object containing such a formula is processed, the following happens:

1. The formula performs an operation, which produces a result.
2. The result replaces the field code in the text object.

This process of performing an operation and substituting its result is called "rendering."

### Important

Field codes can be used in outgoing text objects only.

A complete reference list of field codes is available in the Genesys eServices Field Codes Reference Manual.

# Create and Insert Field Codes

## Contents

- [1 Creating Field Codes](#)
- [2 Inserting Field Codes into a Standard Response](#)



- Administrator

Learn how to create field codes and include them in your standard responses.

### Related documentation:

- 

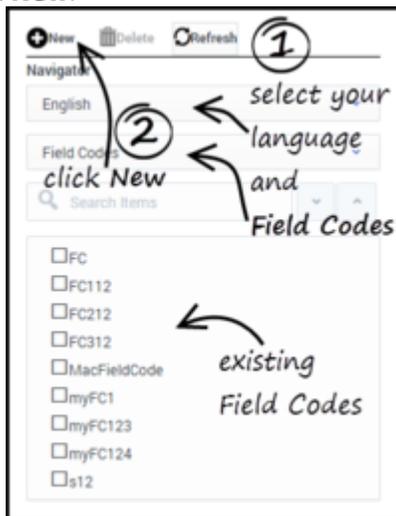
Field Codes in Standard Responses are placeholders for data that changes over time or by customer. Create Field Codes and include them in your Standard Responses.

- Creating Field Codes
- Inserting Field Codes into a Standard Response

## Creating Field Codes

From the eServices Manager browser window:

1. Select the language and **Field Codes** from the drop-down menus.
2. Click **New**.



3. To configure your new Field Code, enter the properties you need in the Field Code configuration pane and then click **Save**.

The screenshot shows the 'Field Code' dialog box. It has the following fields and buttons:

- Name:** CustomerAccount (with handwritten annotation 1: "Choose the variables you want")
- Description:** customer account number
- System Variables:** Contact.Id (with an Insert button)
- Custom Variables:** CustAccount (with an Insert button, and handwritten annotation 2: "then click Insert" pointing to this button)
- Text:** Agent.FirstName+CustAccount (with handwritten annotation 3: "the selected variables appear in the Text field")
- Buttons:** Create Custom Variable, Check, Cancel, Save

The new Field Code appears in the Category Tree pane. You can edit a Field Code anytime by double-clicking it in the Category Tree.

4. Enter a name and (optionally) a description for the field code.
5. Select System and/or Custom variables from the drop-down lists.
6. Click **Insert** to populate the text box with the selected variables. See a detailed discussion of variables in eServices Manager.

If the custom variable you need is not in the list, you can create a custom variable:

1. Click **Create Custom Variable**. The Custom Variable dialog box appears.
2. Enter a name (required) and description (optional).

### Important

The name must consist only of alphanumeric characters or underscores.

3. Select **String** or **Integer** for the type.
4. Enter a default value. This is mandatory.
5. Click **Add**. The new custom variable appears in the list.

### Important

You can also use this dialog box to edit and delete (Remove) existing custom variables.

6. Click **OK**.
7. Enter any other desired text in the Text field. This text must conform to the rules described in Using Formulas in Field Codes.

8. Click **Check** to verify that the field code is well-formed (that is, that it has no typographical errors, missing parentheses, and so on).

For detailed help constructing Field Codes, see Using Formulas in Field Codes.

For examples showing the use of a custom variable and of a complex Field Code, see Field Code Examples

## Inserting Field Codes into a Standard Response

### Important

Standard Responses that are intended for use in FAQ objects should not contain field codes.

To insert Field Codes:

1. Select a Standard Response from the Category Tree or else create a new Standard Response.
2. You can insert Field Codes in two ways:
  - Plain text version:
    1. Click in the plain text area. A table of field codes displays to the right (if you click elsewhere the table disappears).
    2. Drag and drop the field code from the table into the standard response.
  - HTML version:
    1. Move the cursor to the right to make the field code table display.
    2. Double-click a field code to insert it in the standard response.
3. Click **Insert Field Code** to display a list of all the available field codes.
4. Select a field code and click **OK** to insert it, together with its required delimiters (), into the Standard Response.
5. Click **Check Field Codes** to see the standard response with the Field Codes rendered, showing the default values for each Field Code.

# Field Code Variables

## Contents

- [1 Interaction](#)
- [2 Contact](#)
- [3 Agent](#)
- [4 Custom Variables](#)
- [5 Using Your Own Data in Standard Responses](#)



- Administrator

Learn how you can use system variables, custom variables, and your own data in standard responses.

### **Related documentation:**

- 

In the example given in Field Codes Overview, the `Contact.FirstName` retrieves a piece of data about the interaction. The ability to access interaction data is perhaps the most frequent use of field codes. Although field code formulas can be very complicated, many simply retrieve a single piece of data, such as a contact's name.

You access Universal Contact Server data using predefined variables, called "system variables."

These variables access three predefined objects. Each object has a name and a set of properties. In the example, `Contact` is an object and `FirstName` is one of its properties. The system variable `Contact.FirstName` retrieves the value of the `FirstName` property of the `Contact` object.

In similar fashion, there is a system variable for each object+property pair. The objects and properties that you can use in field code formulas are described in the following sections.

### Interaction

This object represents the particular interaction being worked on, such as an inbound e-mail. These are its properties:

- `Id`
- `DateCreated`
- `Subject`
- `ToAddress`
- `FromAddress`
- `AttachedData`
- `TimeZone`

### Contact

This object represents the contact associated with the interaction being worked on. These are its properties:

- `Id`

- Title
- FirstName
- LastName
- FullName
- PrimaryPhoneNumber
- PrimaryEmailAddress

## Agent

This object represents the agent working on the interaction. These are its properties:

- FirstName
- LastName
- FullName
- Signature

### Important

Automated responses use the default agent. Create the default agent as a Person object just like any other in Configuration Manager. Then select this Person on the Automated Reply Agent screen of the E-mail Server configuration wizard (or set this Person as the value of the autobot-agent-login-name option in the E-Mail Processing section of the E-mail Server Java application). Since this is the Person who the automated response appears to be from, you may want to name it after your company or institution.

## Custom Variables

In addition to the system variables, you can use eServices Manager to create custom variables. Custom variables have the following properties:

- Their values are assigned by strategy objects.
- Therefore, standard responses that use field codes containing custom variables must have the usage type Autoresponse or Acknowledgment.

For an example of the use of a custom variable in a standard response, see [Using a Custom Variable](#).

### Important

The names of custom variables must begin with an alphabetic character or

underscore, and the remainder of the name must consist only of alphanumeric characters or underscores. This differs from the requirements for the names of other eServices Manager objects, which may also contain hyphen and space. For example, 5-usercode is not an acceptable name for a custom variable, but it is acceptable as the name of a screening rule or category.

## Using Your Own Data in Standard Responses

It is possible to incorporate data that you keep external to Universal Contact Server into your standard responses (including automated responses). This data could include case numbers, account information, and so on. Remember that attached data always consists of key-value pairs. Incorporating external data into standard responses is a two-step process:

1. Retrieve the external information and add it to the interaction as attached data. One place to do this is in a routing strategy.
2. Now that you have attached the data to the interaction, you can use the `AttachedData` property of the `Interaction` object to access the data and incorporate it into your standard response. The `AttachedData` property requires one argument, which is the key name. The result of the following formula is the value associated with the `OrderStatus` attached-data key:

# Using Formulas in Field Codes

## Contents

- [1 Field Code Syntax](#)
- [2 HTML in Field Codes](#)
- [3 Operator Precedence](#)
  - [3.1 Data Types](#)
- [4 Functions](#)
  - [4.1 Using Objects](#)



- Administrator

View formula usage in field codes.

### **Related documentation:**

- 

In addition to system variables such as `Contact.FirstName`, field codes may contain formulas. This section provides an outline of formula usage. Details on many of these topics are provided in the Genesys eServices Field Codes Reference Manual.

You must always delimit field codes by using `{}` . If you type a field code directly into the body of a standard response, then you must enter the delimiters yourself. If you select from the list of field codes in eServices Manager, then the delimiters are added automatically.

The text that appears inside the delimiters is a formula. Field code formulas are very similar to formulas in other applications, such as Microsoft Excel.

A *formula* is a sequence of one or more operands (such as numbers and text strings), separated by operators (such as `+` and `-`).

For example, in the following formula, 2 and 3 are operands and `+` is an operator:

Operands can be values that do not change (constants), or values that vary based on the context. In the previous formula, all the operands are constants, so the formula always evaluates to 5. The next formula, on the other hand, evaluates to a different value for each agent who uses it:

## Field Code Syntax

To summarize field code syntax:

- A field code must be delimited by `{}`.
- Alphabetic strings, whether constants in formulas or elsewhere in a field code, must be enclosed in double quotes.
- Numeric constants require no special treatment.
- You must use special characters for some purposes. For example, for your field code to render with a line break, you cannot simply type a carriage return. Instead, you must insert the expression `\n`. A list of these special characters is available.

### HTML in Field Codes

With special configuration, field codes can contain HTML markup; for example, you could have a field code defined as

```
Sam Agent
Acme Products
29 Exterior Blvd
Springfield, CX 09090
```

To enable this, you must use the Java property `-Dsr1-field-code-allow-html=true`, in one of the following ways:

- Add it to the `JavaArgs` section of `ContactServerDriver.ini`
- Add it as an argument to the startup command line in `contactServer.sh`.

### Operator Precedence

If you use more than one operator in a formula, the order in which they are evaluated depends on their relative *precedence* (higher precedence operators are evaluated first). For example, multiplication (\*) has a higher precedence than addition (+), so that the formula below evaluates to 14, not 20:

You can use parentheses to override the default precedence. The formula below evaluates to 20:

For a complete list of operators and their relative precedence, see "Operator Precedence" in the Genesys eServices Field Codes Reference Manual.

### Data Types

Operands of several different types may appear in formulas:

- Number
- String (text)
- Date/time
- Boolean (true/false)
- Object (Contact, Interaction, and Agent)

Each data type behaves differently in formulas, and the operators have different meanings when you

---

use them with different data types. For example, the + operator means “add” when used with numbers, but “concatenate” (paste together) when used with strings. This formula evaluates to *Uncle Sam Wants You*:

In addition, some operators cannot be used with some data types at all. For example, you cannot use the multiplication (\*) operator on two strings.

All formulas, regardless of their final data type, are converted to strings before being merged into your standard response. This conversion follows a set of default rules that depend on the data type. For example, the default rules for numbers round them off to integers. This formula causes 2 to be inserted into your standard response, even though the real result is 2.25:

You can use the Text function (see below) or format operator:) to override the default formatting. Either of the following formulas inserts 2.25 into your standard response:

For a detailed list of data types and how you can use them, see “Data Types” in the Genesys eServices Field Codes Reference Manual..

## Functions

When composing formulas, you can use many built-in functions. *Functions* are predefined formulas that perform calculations using values, called *arguments*, which you supply. To use a function, write its name, followed by an opening parenthesis, the arguments for the function separated by commas, and a closing parenthesis.

Function arguments may be of any data type, although individual functions may place restrictions on their arguments. Function arguments may be constants or formulas. The Length function, for example, takes a single string argument and returns its length in characters. This formula evaluates to 13:

As another example, the Date function takes individual date components (year, month, day, and so on), and constructs a date/time value. The formula below evaluates to 1965-11-23 09:03:10:

Functions may act as arguments to other functions. The WeekdayName function takes a single date/time argument and returns the day of the week as a string. The formula below evaluates to Tuesday:

This formula evaluates to 7:

---

)

For detailed descriptions of all available functions, see "Functions" in the Genesys eServices Field Codes Reference Manual.

## Using Objects

All object/property pairs are also available in the Variables drop-down menu in the Knowledge Manager Field Code Editor.

Object properties can be of any data type. `Agent.FullName`, for example, is a string, but `Interaction.DateCreated` is a date/time.

The data type of an object property can even be another object. For example, `Contact.EmailAddresses` yields another object called a `ContactEmailAddressList`. In cases such as this, you can access the properties of the resulting object by entering a period (`.`), followed by the property name, just as before. For example, the formula below evaluates to the number of e-mail addresses assigned to the contact:

Some object properties require arguments just as functions do. For these properties, write the arguments, enclosed in parentheses after the property name, just as before.

For example, the `ContactEmailAddressList` object has a property named `Exists`, which you can use to test whether a particular e-mail address is assigned to a contact. The data type of this property is Boolean (true/false), and it takes one argument, the e-mail address to test. For example:

For detailed descriptions of all objects and their properties, see "Objects" in the Genesys eServices Field Codes Reference Manual.

# Field Code Examples

## Contents

- [1 Using a custom variable](#)
- [2 Using a Complex Field Code](#)
- [3 Next steps](#)



- Administrator

View examples of the use of field codes.

### Related documentation:

- 

## Using a custom variable

**Purpose:** This is a simple example of the use of a custom variable in a standard response.

### Prerequisites

This example assumes a category tree that includes categories called Cookbooks, Mysteries, and Reference.

### Steps

1. In eServices Manager:
  1. Create a custom variable called QueryTopic (see See Creating field codes).
  2. Create a field code called Query\_Topic that consists of the variable QueryTopic.
  3. Create a standard response of type Autoresponse called AUTO that includes the sentence Thank you for your inquiry about .
  4. Create the following screening rules:
    - Cookbook: `RegexFind("cook") | | RegexFind("recipe") | | RegexFind("food") | | RegexFind("cuisine")`
    - Mystery: `RegexFind("murder") | | RegexFind("crime") | | RegexFind("case of the") | | RegexFind("detective")`
    - Reference: `RegexFind("dictionar") | | RegexFind("encyclopedia") | | RegexFind("almanac")`
2. In Interaction Routing Designer, create a strategy that applies these screening rules one after the other, assigning a different value to the custom variable for each screening rule:
  1. Create a variable called var\_screen.
  2. Create a strategy. Start the strategy with a Screen object. On the General tab of the Screen object, select the Cookbook rule.
  3. On the Result tab, click Assign values of the key-value pairs. Then under Output values select var\_screen for Variable and enter ScreenRuleMatch for Key from output.
  4. Connect the Screen object to a Generic Segmentation object. Create two segments: var\_screen =



This field code inserts a tardiness apology if more than 14 days have elapsed since the interaction first entered the system. It uses the function `If`, which has these properties:

- Its syntax is `If (Boolean, TrueResult, FalseResult)`
- If `Boolean` evaluates to `True`, it returns the second argument.
- If `Boolean` evaluates to `False`, it returns the third argument.

In this example, the three arguments of `If` are as follows:

1. `Time() - Interaction.DateCreated > 14`  
A formula that returns `True` if the difference between the date created and the current system time is more than 14 days. (The result of a mathematical operation on dates is given in days.)
2. `"Please accept our apologies for not having replied sooner. "`  
A text string apologizing for tardiness, inserted if the formula evaluates to `True`.
3. The null string: if the reply is not late (the formula evaluates to `False`), nothing is inserted in it.

## Next steps

Go on to create and manage Screening Rules.

# Screening rules

## Contents

- [1 More information](#)
- [2 Examples of screening rules](#)
  - [2.1 Example: Credit card number](#)
  - [2.2 Example: North American phone number](#)
  - [2.3 Example: Telltale Words](#)



- Administrator

Screening rules enable you to analyze messages so that you can decide how to handle them. This page describes screening rules and provides examples for common purposes.

### Related documentation:

- 

Screening rules scan an interaction and try to match either a destination address (who the message is going to, whether that is identified by an email address, a cell phone number, or some other parameter), a regular expression, or both. Screening is performed by Classification Server when it is triggered by a Screen Interaction object in a Routing Strategy.

A screening rule can optionally be associated with a Category.

You can cut, copy, paste, and delete screening rules as well as other eServices Manager objects.

### Important

Screening can operate on any interaction that has text somehow associated with it, whether as the body of the interaction (e-mail, chat), or otherwise (as user data, for example). In practice, it is expected that most interactions which are screened will be e-mail messages; therefore, the terms *e-mail* and *message* are used interchangeably here, to refer to these interactions. In fact, whatever is said here about e-mail applies to any interaction that has associated text.

### More information

See the following links for more information:

- How to create and test screening rules
- Screening rules reference—This section includes:
  - What screening rules check
  - The functions, arguments, and operators you can use
  - Regular expressions

### Examples of screening rules

The following examples show screening rules you can use for typical purposes:

- Credit card number
- North American phone number
- Telltale words

### Example: Credit card number

To find text that includes a typical credit card number, you need to match a sequence of four groups of four digits, each group separated by - (hyphen):

```
\d\d\d\d\d-\d\d\d\d\d-\d\d\d\d\d-\d\d\d\d\d
```

#### Important

This regular expression also works without the \ (backslash) before the hyphens. However, it is better practice to write \- for the character hyphen, because the hyphen also has a special use in range expressions like [a-z].

Or if you want to allow for the possibility that some people will omit the hyphens, use? to make the hyphen optional:

```
\d\d\d\d\d-?\d\d\d\d\d-?\d\d\d\d\d-?\d\d\d\d\d
```

You could also use the repetition notation to shorten each \d\d\d\d\d to \d{4}.

### Example: North American phone number

North American phone numbers consists of ten digits, grouped into two groups of three and one of four. There are a number of ways for the groups to be separated:

- 203-555-1234
- (203) 555-1234
- (203)555-1234
- 203 555-1234
- 203.555.1234

The following regular expression matches all of the above:

```
(\d\d\d|(\d\d\d\d))[\s\.\-]?s*\d\d\d[\-\.\s]\d\d\d\d
```

#### Phone Number Regular Expression

Symbols	Meaning	Remarks
\d\d\d	Three digits	

Symbols	Meaning	Remarks
\d\d\d (\d\d\d)	Three digits, or three digits enclosed in parentheses	\ turns off the special meaning of the character (
[\s\.-]?	Space or period or hyphen or zero	Any one of the items enclosed in square brackets, either once or not at all
\s*	Zero or more spaces	
\d\d\d	Three digits	
[\-\.]	Hyphen or period	Note again the need to use \
\d\d\d\d	Four digits	

### Example: Telltale Words

To screen for interactions from dissatisfied customers, you might try a regular expression like the following:

```
(not\s([a-z]+\s)*(pleased | satisfied)) | unhappy | complain
```

The first part of this expression matches "not" followed by zero or more words followed by "pleased" or "satisfied"; for example, "not" very pleased, not satisfied, not at all satisfied (but it also matches strings like "can not believe how pleased I am"). The rest matches the single words "unhappy" and "complain."

# Create and test screening rules

## Contents

- [1 The high-level steps](#)
- [2 Configuring a Screening Rule](#)
- [3 Assign categories and remove category assignments](#)
  - [3.1 Service Categories](#)
- [4 Test a Screening Rule](#)
- [5 Finding an existing Screening Rule](#)
- [6 Next steps](#)



- Administrator

Create, manage, and test screening rules that you can use to screen messages.

### Related documentation:

- 

The step by step procedure for creating a Screening Rule is quite simple. The power of Screening Rules lies in the many ways you can configure them. We'll start with the high-level procedure, then drill down as needed into more detailed explanations of the various parameters.

This page contains the following sets of instructions:

- The high-level steps
- Configuring a Screening Rule
- Assign categories and remove category assignments
- Test a Screening Rule
- Finding an existing Screening Rule

## The high-level steps

Note that the order of these steps matters!

1. Start on the eServices Manager browser window. Select the correct:
  - Tenant
  - UCS Server
  - Language
2. On the **Navigator** drop-down menu, select **Screening Rules**.

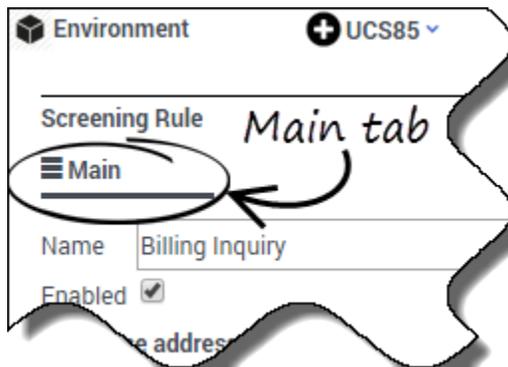


3. On the Category Tree, check the boxes for the categories this Screening Rule should apply to.
4. Click **New**.

5. Select **Screening Rule**.
6. After configuring the Screening Rule—which will be explained shortly—click **Save**. The new Screening Rule appears in the Category Tree under the selected Root Category.
7. To edit a Screening Rule, highlight it in the Category Tree and then make the desired changes. Don't forget to click **Save** when you are done.

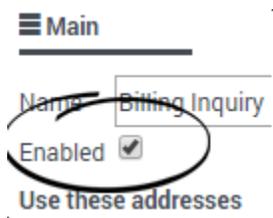
## Configuring a Screening Rule

Configuring a Screening Rule is mostly done on the Main tab.



When you name your Rule, remember that you can use only permitted characters in object names.

Check the **Enabled** check box to make this Rule available when you add a Screen object to a routing strategy.



Once a strategy includes a Screen object that uses a particular Screening Rule, the strategy will continue to use the Rule whether it is disabled or enabled.

### **Do you need to use the Order text box?**

- If the Screening Rule is used in a Multiscreen routing object in which **All rules** is selected, use the **Order** text box to specify where in the sequence of rules this particular one should be applied.

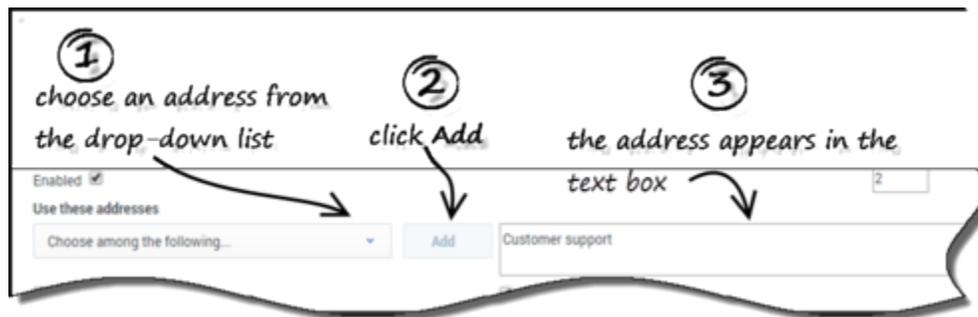
Order  
2

- In other cases, the **Order** text box is unused.

### Do you need to screen the addresses the email is sent to?

- If so, in the **Use these addresses** area, select an address from the left-hand window, then click **Add** to copy it to the right-hand window. You can add as many addresses as you need. If the address you need isn't there yet, you can
  - Directly type an address in the right-hand window.
  - Define additional addresses in the **EmailAccounts** configuration database object:  
GAX: **Configuration > Routing/eServices > Business Attribute Values > Business Attributes > EmailAccounts > Attribute Values**

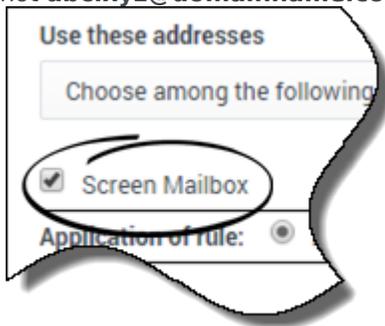
Config Manager: **Tenant > Business Attributes > EmailAccounts > Attribute Values**



- If you don't need to screen addresses, leave this section empty.

### Does it matter if the address is exact?

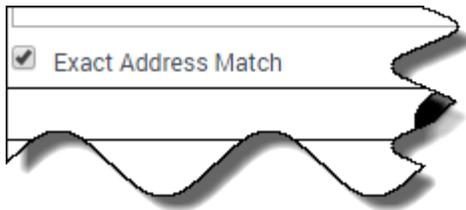
- If so, select the **Exact address match** box. The screening rule looks for messages having that exact address as a destination. For example, **xyz@domainname.com** matches **xyz@domainname.com** but not **abc.xyz@domainname.com**. This match is not case sensitive.



- If not, clear the **Exact address match** box. Then the rule looks for messages having that address as a substring of their destination address. For example, **xyz@domainname.com** matches **abc.xyz@domainname.com** and **xyz@domainname.com**.

### Do you want to screen for the exact POP mailbox the email is sent to?

- If so, select **Screen mailbox** to make the rule match the POP box from which the e-mail entered the eServices system, rather than the **To** field of the e-mail itself. The difference is that each e-mail enters the system from exactly one mailbox, while the **To** field can contain multiple addresses.

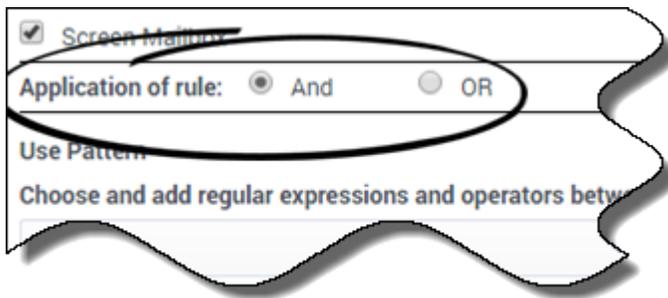


**Important**

For this feature to work as expected, the E-mail Server **enable-same-mail-from-mailboxes** option must be set to true. With this setting, E-mail Server creates a separate interaction for each address in the **To** field (that is, for each mailbox that it pulls the e-mail from when it creates the interaction).

**How to use the AND and OR radio buttons**

- **AND**  
Choosing **AND** makes eServices Manager use *both* the addresses selected in **Use these addresses** and match the pattern defined in **Use Pattern**.
- **OR**  
Choosing **OR** makes eServices Manager use *either* the addresses selected in **Use these addresses** or match the pattern defined in **Use Pattern**.



**How to configure the Use Pattern area**

This is the section where you can get really specific about what the Screening Rule should match. The Plug-in includes a pattern builder that offers the choice of each function type in all possible forms, with and without optional arguments, for a total of eight, as shown below.



The drop-down lists in the **Use Pattern** are contain regular expressions (functions) and operators you can select to create your Rule. Select the regular expression you want, and then click **Add**. The expression appears in the text box. Do the same to add operators. You can also enter text manually.



After you select an expression and click **Add**, you must put text between the quotation marks. More specifically, you must:

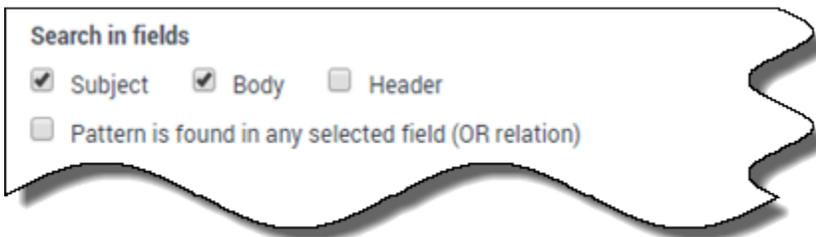
- For **Find**, put text between the empty quotation marks.
- For **RegExFind** and **RegExMatch**, substitute your desired text for regular expression and/or key.

### Important

See Screening Rules reference for an in-depth explanation of how to construct rules.

### What message sections should the Screening Rule apply to?

Use the check boxes to have the Screening Rule apply to the message body, subject, header, or any combination. You must select at least one.



## Create and test screening rules

---

If you check multiple boxes, the Screening Rule can behave in one of two ways. See Email sections to screen for an explanation.

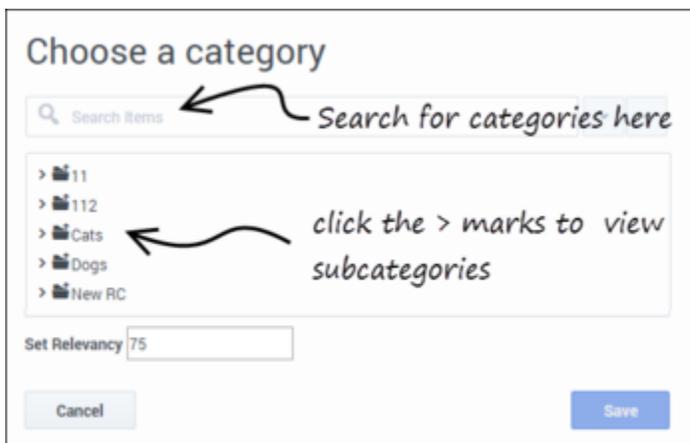
## Assign categories and remove category assignments

You must select a category from the Category Tree to create a Screening Rule. However, you can remove or add to the categories associated with the rule after you create it.

Click the **Categories** tab to open the **Choose a Category** dialog box.



When an interaction matches this screening rule, it receives a category name and a confidence level. The confidence level indicates that the system is *X percent* confident that this interaction belongs in this category. *X percent* is the Relevancy value you set here.



Choose the desired categories and then click **Save**.

## Service Categories

When using the eServices Manager interface, it is possible to create screening rules that are not associated with any category. In eServices Manager, any such screening rules are assigned to a category called ; for example, .

## Create and test screening rules

---

You can add rules to an existing Service Category in any of the following ways:

- By using a rule (created in eServices Manager) that has no associated category
- By removing all categories from an existing rule.
- By deleting a category that has a rule associated with only that category.

After any of these, click **Refresh** to see the rule appear in the Service Category.

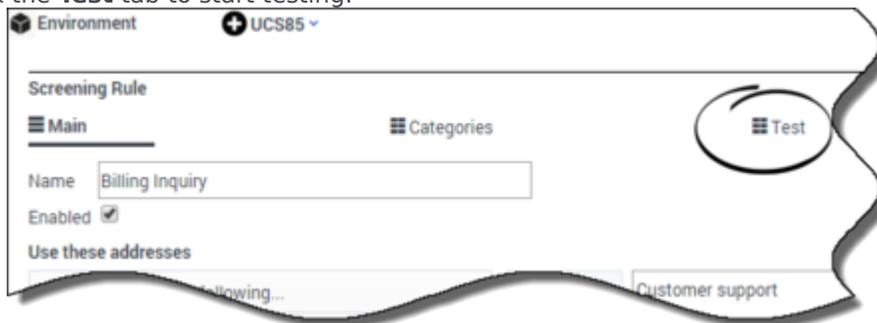
Other details about Service Categories:

- Rules under the service category can be *cut* and *pasted* under other categories. This deletes the rule from the Service Category and associates it with the new category. However, you cannot *copy* rules from a Service Category.
- You cannot paste a rule into a Service Category.
- You cannot cut, copy, or paste the Service Category itself.
- If you delete a Service Category, you also delete all of the rules associated with it and they cannot be recovered.

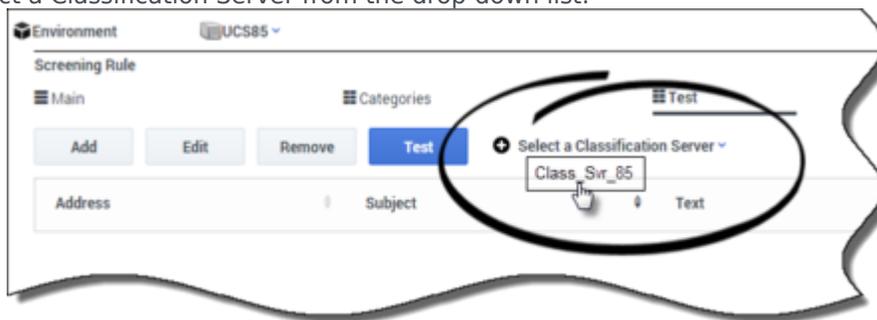
## Test a Screening Rule

You will be testing your Screening Rule against some specially created text to see if it works as desired.

1. Click the **Test** tab to start testing.



2. Select a Classification Server from the drop-down list.

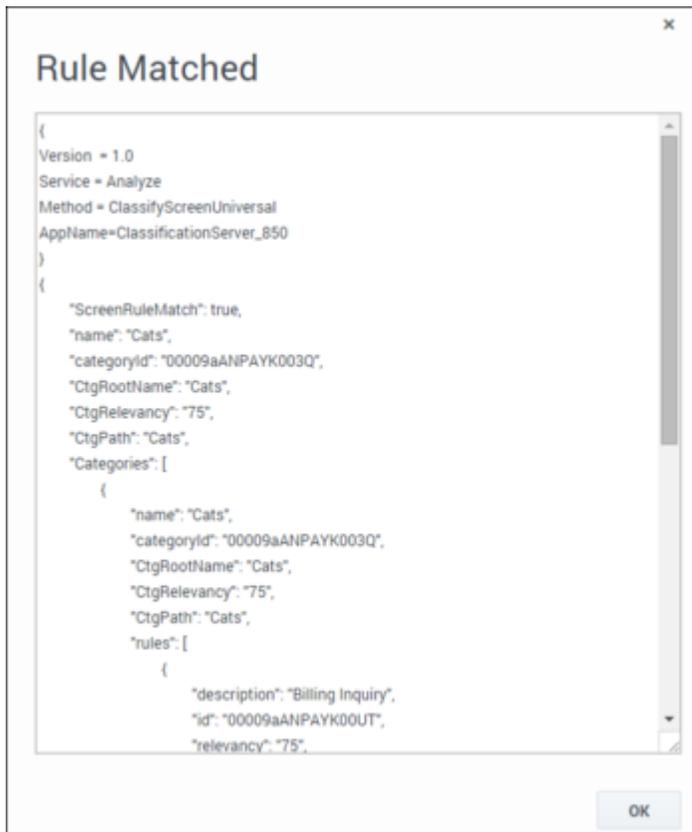


## Create and test screening rules

3. Choose a test message from the list of those already created or click **Add** to create a new one.
4. Click **Test**.



If your test message fulfills the constraints you created for your rule, you will receive a detailed message indicating success.



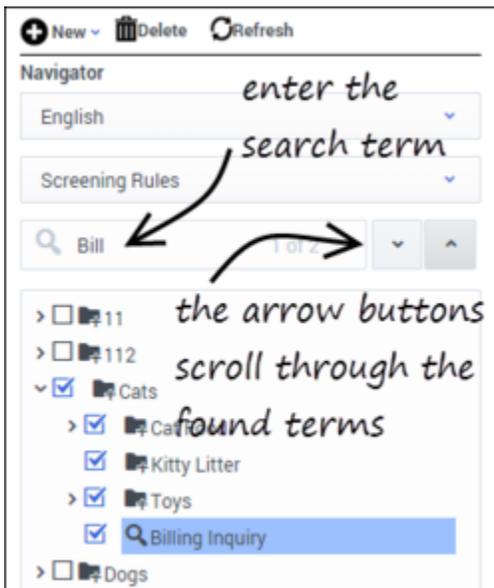
If you get a **Rule Not Matched** message, check the message for clues to the problem. If necessary, analyze your Screening Rule step by step to determine what needs to be edited to make it work the way you want.

### Important

The test messages created by each user are stored separately, and are not synchronized between multiple eServices Manager instances. Test messages that you create are stored on your local machine under the default Documents folder of the logged-in Windows User folder, in the UserInfo file. This file is binary and must not be edited manually.

## Finding an existing Screening Rule

To search for a Screening Rule, make sure **Screening Rules** is selected in the **Navigator** drop-down list. Then start typing in the name of the rule in the **Search** field. The matching names are highlighted as you begin typing.



## Next steps

- Learn more about how screening rules work:
  - Screening Rules reference
  - Screening Rules examples

# Screening Rule reference

## Contents

- [1 What text do screening rules check?](#)
  - [1.1 Email sections to screen](#)
- [2 Functions](#)
- [3 Arguments](#)
- [4 Operators](#)
- [5 Regular expressions](#)
  - [5.1 Elements of regular expressions](#)



- Administrator

View the functions, arguments, and regular expressions that you can use in screening rules, and how they operate to screen messages.

### Related documentation:

- 

## What text do screening rules check?

Screening rules check the following parts of an interaction, depending on what you select in the Screening Rule Editor, and on the settings in the IRD screening objects:

- The subject, if you select that check box.
- The body, if you select that check box.
- The header, if you select that check box. See also "Subject, Body, and Header" below, on how screening rules behave if two or more of the preceding are selected.
- The destination address, if you have put anything in the right-hand box in the **Use these addresses** area of the **Edit Screening Rule** dialog box.
- The value of any key in the user data, if both of the following are true:
  - In the Multiscreen or Classify strategy object, you select a key in the **User data key if specified** drop-down list under **Get screened data from**.
  - In the Screening Rule Editor, you select the **Body** check box in the **Use pattern** area. Use the check boxes to have the screening rule apply to the message body, subject, header, or any combination. You must select at least one.

User data is first associated with the interaction by the media server when it creates that interaction. As an example, E-mail Server associates the following user data with the interaction:

- FirstName (from Contact information)
- LastName (from Contact information)
- Mailbox (value of the **address** option in the **[pop-client]** section of the E-mail Server Application object)
- To (MIME header field)
- Subject (truncated to 512 characters)
- FromAddress (personal part of From header field)
- FromPersonal (e-mail address part of From header field)

- All Header fields (except Received, Return-Path, X-MIMETrack, Subject, Sender, From, To, Cc, Bcc) prefixed by Header\_
- All parent attached data (originally created by E-mail Server) which can be inherited; that is, all parent attached data:
  - not starting with Header\_
  - not starting with \_ (underscore)
  - not equal to GEM\_Failure
  - not equal to GEM\_FailureMsg
  - not equal to GEM\_FailureArgs

User data may then be added or modified by a routing strategy.

### Email sections to screen

If you select more than one of the Subject, Body, and Header areas, a screening rule can behave in the following two ways:

The default behavior is for the rule to apply to each area in turn; for example, with Subject and Body selected, the rule applies first to the Subject, then to the Body.

The alternative behavior is for all selected items to first be concatenated so that the rule applies to all at once. There are two ways to achieve this alternative behavior.

- To enforce it for all screening rules, set the subject-body-header option for both Knowledge Manager and Classification Server to true.
- To enforce it for a particular screening rule:
  1. Leave subject-body-header set to false.
  2. Open the rule in the Screening Rule Editor.
  3. Select the Merge sources checked above check box.

#### Important

Setting subject-body-header to true overrides any selection of the Merge sources checked above check box for a particular rule.

## Functions

Screening rules can use three basic functions:

- Find(""), where is a text string. It returns the result true if the interaction contains the exact string between quotes, ignoring case.
- RegExFind(""), where is a regular expression (see Regular expressions). It returns the result true if

the interaction contains any string that matches the regular expression between quotes.

- `RegexMatch("")`, where is a regular expression. It returns the result `true` only if the entire content of the interaction matches the regular expression between quotes.

### Important

`RegexFind` and `RegexMatch` are the same except that `RegexFind` looks for a match anywhere in the body of the interaction, whereas `RegexMatch` demands that the entire body of the interaction match the regular expression.

## Arguments

All functions have one required argument, which must appear between double quotation marks, as represented above (`"`) or (`'`). This required argument can be followed by one or two optional arguments, depending on the function. The full form of each function, including all arguments, is as follows:

- `Find("", )`
- `RegexFind("", , )`
- `RegexMatch("", , )`

### IgnoreCase

The `IgnoreCase` argument must be a Boolean value (*true* or *false*). All three functions ignore case in searches unless you include the `IgnoreCase` argument with a value of `false`.

For example:

- `Find("pacific")` finds *Pacific* and *pacific*.
- `Find("Pacific", false)` finds *Pacific* but not *pacific*.

You can also substitute `true` for `false`—for example, `Find("Pacific", true)`—which means that case is ignored. So `Find("Pacific", true)` is the same as `Find("Pacific")`.

### Key

The `key` argument must be a string. If this argument is present, the system creates a key-value pair with the following characteristics:

- The key name is the string specified by the `key` argument, prefixed by `ScrKey_`.
- The value is the material that the screening rule matches.

The system then adds this key-value pair to the interaction's attached data. For example, `RegexFind("[A-Z]\d\d\d", "ID_code", false)`:

1. Finds strings consisting of a capital letter followed by three digits (see Regular expressions).

2. Attaches to the interaction a key-value pair called ScrKey\_ID\_code whose value is A123, X005, M999, or whatever the function found in this interaction to match the regular expression.

## Operators

Operators are of two types:

- Binary operators join two functions.
- Unary operators operate on a single function.

The operators are as follows:

- **&&** is the binary operator "and". For example,

```
Find("interest rate") && Find("APR",false)
```

matches a message only if it includes both "interest rate" and "APR."

- **||** is the binary operator "or." For example,

```
Find("station wagon")
```

## Regular expressions

A regular expression stands for not one particular character string, but a class of character strings.

For example, suppose that you want to find all interactions with U.S. Zip codes in them. U.S. Zip codes are five-digit numbers, so you could in theory write about 9,000 screening rules (Find("00000"), Find("00001"), Find("00002"), and so on).

Fortunately, you can use the special symbol `\d`, which stands for any digit, to write a screening rule using a regular expression: `RegExFind("\d\d\d\d\d")`. This screening rule matches any sequence of five digits.

There are often several different ways of writing the same regular expression.

For instance, two items separated by a hyphen and enclosed in square brackets denotes a range of which the two items are endpoints. So `[a-d]` matches a, b, c, or d, and `[5-8]` matches any digit between 5 and 8; hence `\d` is the same as `[0-9]`.

### Important

In general usage, apart from Genesys eServices, regular expressions are case sensitive. However, in the eServices Manager Plug-in, regular expressions are not case sensitive unless you add `, false` as described in `IgnoreCase`.

The table "Elements of regular expressions" lists some of the most commonly-used elements of regular expressions:

### Elements of regular expressions

Symbol	Meaning	Example
.	Any character, including space	b.t matches <i>bat, bet, bit,</i> and <i>but.</i>
\d	Any digit	\d\d matches any pair of digits from 00 to 99.
\s	Space	\d\s\d matches 1 0, 5 9, and so on.
*	Zero or more instances of the preceding expression	o*f matches <i>oof, of,</i> and <i>f.</i> me.*d matches <i>med, mead,</i> and <i>meed.</i>
+	One or more instances of the preceding expression	bre+d matches <i>bred, breed</i> and <i>breed.</i>
?	Zero or one instances of the preceding expression	c?rude matches <i>rude</i> and <i>crude.</i>
{x}	X instances of the preceding expression	st.{2}k matches <i>steak, stork</i> and <i>stink.</i>
^	Any character except the following	s[^e]t matches <i>sat, sit,</i> and <i>sot,</i> but not <i>set.</i>
[ ]	Any characters or ranges within the brackets	Any characters: b[aeiou]at matches <i>boat</i> but not <i>brat.</i> Any range(s): [0-9]th matches <i>5th, 6th, 7th.</i> [a-z] matches any lowercase letter; [A-Z] matches any uppercase letter.
\	Turns off the special meaning of the symbol that follows	\* matches the character * (asterisk) \. matches the character . (period or full stop).
	Or	[b p]ig matches <i>big</i> and <i>pig.</i> Do not be confused:   means <i>or</i> in regular expressions, but    means <i>or</i> as one of the Operators used in screening rule formulas.

Here are some other points to keep in mind:

- Space is just another character. The regular expression `savings account` contains a space, and so it does not match the string `savingsaccount`.
- Word boundaries are not considered. The regular expression `read` matches not only `read`, but also `reader, ready, spread, bread,` and so on.

- Use parentheses to group parts of regular expressions together. For example, `RegexFind("(\\d{3}\\.){2}")` puts `\\d{3}\\.` in parentheses so that the number-of-instances item {2} applies to the all of `d{3}\\.`, not just to `\\.` This expression matches any group of three digits plus period plus any three digits plus period (for example, 198.351.). Further examples are provided in Examples of screening rules.
- Regular expressions make use of many more special characters and operators than those listed in the table "Elements of Regular Expressions." Much documentation on regular expressions is available on the Web. Because Genesys Knowledge Manager uses Java classes for regular expressions, it is best to consult documents describing the particular version of regular expressions used in Java.

# Managing and working with objects

## Contents

- **1 Cut/Copy/Paste objects**
  - 1.1 Categories
  - 1.2 Standard responses, field codes, and screening rules
  - 1.3 Important notes about screening rules
- **2 Importing and exporting objects**
  - 2.1 Export
  - 2.2 Import a KME file
  - 2.3 Import an Excel file
- **3 Search**
  - 3.1 Search for categories
  - 3.2 Search for standard responses
  - 3.3 Search for field codes
  - 3.4 Search for custom variables
  - 3.5 Search for screening rules



- Administrator

Learn how to manage and work with eServices Manager objects such as categories, standard responses, field codes, and screening rules.

### Related documentation:

- 

You can perform various operations to help you manage and work with eServices Manager objects such as categories, standard responses, field codes, and screening rules. For example, you can cut/copy/paste, import and export, and search for objects.

## Cut/Copy/Paste objects

You can cut, copy, or paste categories as well as standard responses, field codes, and screening rules.

The general procedure is:

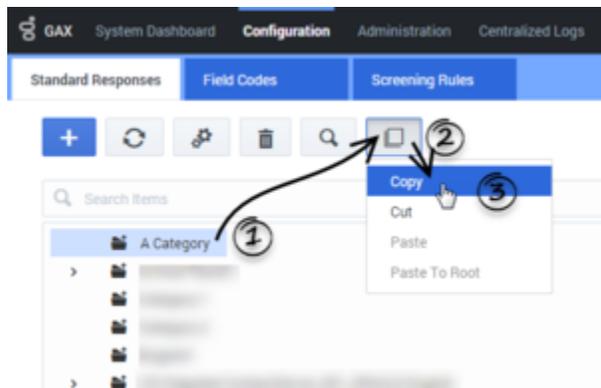
1. Select the target object(s).
2. Click  and select an action (for example, **Copy**).

### Important

- When you cut an object, it disappears from its original location only after you paste it somewhere else—except that if you cut a category that has a linked screening rule, the screening rule remains in its original location.
- You can also delete any object by selecting it, then clicking .
- Root category names must be unique across all languages.
- If you paste an object into a location that includes an object with the same name, the pasted object is renamed **Copy\_of\_**.

## Categories

You can cut, copy, or paste one category at a time.



Copying a category in eServices Manager.

1. Click the category that you want to cut or copy.

2. Click  and select an action (for example, **Copy**).

3. Do one of the following:

- To paste inside a category: Click the target category, and then click  and select **Paste**.

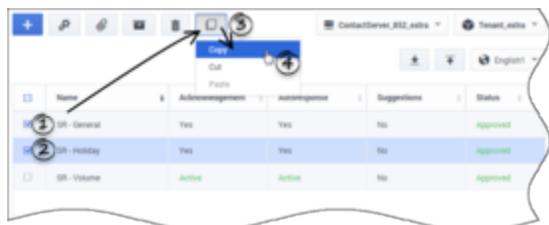
### Important

You cannot use the **Paste** option if you previously cut a source category and it is still selected.

- To paste to the root category: Click  and select **Paste to Root**.

## Standard responses, field codes, and screening rules

You can cut, copy, or paste one or more objects at a time. See Important notes about screening rules for information pertaining only to screening rules.



Copying two standard responses in eServices Manager.

1. Click the check box beside each object that you want to cut or copy.

### Tip

You can click the check box in the header row to select all objects in the table.

2. Click  and select an action (for example, **Copy**).
3. Do one of the following:
  - For standard responses and screening rules: Go to the category into which you want to paste the objects. Click  and select **Paste**.
  - For field codes: Click  and select **Paste**.

### Important

Field codes are shared across all languages.

## Important notes about screening rules

Screening rules can be cut, copied, and pasted using the same method as standard responses and field codes. However, there are additional options and restrictions to consider:

- You cannot use the **Paste** option if you cut a screening rule and you are still in the same category. You must go to a different category to use the **Paste** option.
- The **Paste as link** option links a copied screening rule to a target category, but it does not create a separate copy of the screening rule. This is useful if you want to use a screening rule in multiple categories, but you still want to manage the rule from a central location.
- You cannot use the **Paste as link** option in the List view, or if you cut a screening rule in the List view and subsequently switched to the Tree view.
- You can use the **Unlink from Category** option (Tree view) or **Unlink from all Categories** option (List view) to unlink selected screening rule(s) from the category (Tree view) or all categories (List view).

## Importing and exporting objects

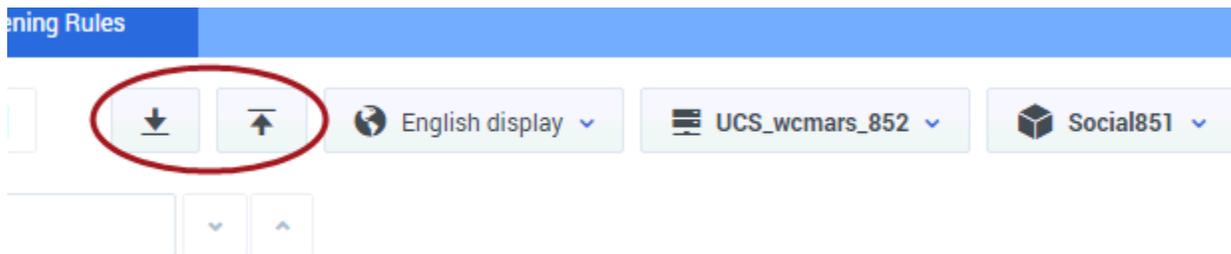
You can export and import categories, standard responses, field codes, screening rules, training data objects, and models (training data objects and models are handled by Genesys Content Analyzer).

## Important

There are two exceptions: test messages and custom variables cannot be imported or exported.

Use exported files as backups or to transfer objects between environments.

The import and export buttons are at the upper right of the eServices Manager window, next to the dropdowns for language, UCS, and tenant. Export is the down arrow, and Import is the up arrow.



## Export

The process of exporting is simple. After you click the Export icon, a series of windows allows you to select:

- Root categories (and their associated category trees)
- Training Data Objects
- Models
- Screening rules

At the beginning, you decide whether the category tree(s) that you select will also include their associated Standard Responses and Field Codes.

The resulting file has the extension .kme.

## Import a KME file

Clicking the Import icon takes you through these windows:

1. **Import - Select file and options.** Click **Select** to navigate to the KME file you want to import. See below for explanations of the options **Update screening rules** and **Create new UCS ids** (selected by default).
2. **Import - Edit category names**  
If the import file includes any category that has the same name as an existing category, eServices Manager asks you to rename the incoming category.
3. **Import - Process import file**  
This simply shows the progress of the import process.

Note the following:

- The check box **Create new UCS Ids** controls whether the imported records receive new database IDs. Genesys strongly recommends that you leave this check box selected; otherwise, the imported records keep their old IDs and there is a risk of creating uniqueness conflicts. It is only safe to keep old IDs when you are importing into an empty database. One reason to keep the old IDs would be to preserve compatibility with non-eServices Manager components (such as a routing strategy) that need to refer to them.

### Important

If the **Create new UCS Ids** check box is cleared and an imported object comes in with an ID that is identical with an existing object's ID, the import process cancels.

- The check box **Update screening rules** controls whether imported screening rules overwrite existing screening rules with the same name. If this check box is not selected, screening rules are treated like all other objects, as described in the preceding paragraph. If the check box is selected, screening rules are treated differently from all other objects: If the names match, the imported screening rule replaces the existing one.
- If an imported screening rule's name does not match any existing rule, but its database ID happens to match that of an existing rule, then eServices Manager creates a new ID for the imported rule.
- If a root category being imported has the same name as an existing category, eServices Manager asks you to change the name of the category being imported.
- If other objects have the same name as existing objects, eServices Manager appends \_ to the name of the imported object. is a timestamp where h is the hour (using a 12-hour clock), m is the minutes, and s is the seconds. Each unit may be one or two digits; there is no padding. For example, if at 4:25:07 PM you import a screening rule called Sales, and there is also an existing rule called Sales, the new name of the imported rule is Sales\_4257.

### Important

This adds between four and seven characters to the name of the object. You should be especially careful of this if any imported object's name is more than 58 characters long: the added characters may produce a new name that violates the 64-character limit on names of eServices Manager objects. Importing may fail on objects with names that are too long.

- If a Training Data Object contains no training messages, it cannot be imported.

### Warning

Once you import an archive that includes any Training Data Object, you cannot import the archive again to a different language. If you attempt to do so, you will receive a message asking you to change the root category name, but when you do that you receive an error message saying that a Training Data Object with that name already exists.

As a workaround, you can rename the Training Data Object before importing the second time.

## Import an Excel file

You can perform a bulk import of standard responses from Excel files, including *.xls* (Excel 1997-2003) and *.xlsx*. Other formats are not supported.

The Excel file must use the columns listed in the table below, and these columns must appear in the first row of the first worksheet. All other data is ignored.

Column name	Description	Valid values	Default value	Comments
TheName	Populates in the <b>Name</b> field in the UI.	Any string	Mandatory	128 chars max
Body	Populates the body text in the <b>General</b> tab. Uses plaintext characters only.	Any string	Empty string	unlimited
StructuredBody	Populates the body text in the <b>HTML</b> tab. Uses plaintext characters and HTML.	Any string	Empty string	unlimited
Description	Populates the <b>Description</b> field in the UI.	Any string	Empty string	254 chars max
Subject	Populates the <b>Subject</b> field in the UI.	Any string	Empty string	512 chars max
MimeType	Defines the mime type of the standard response.	Not verified during the import process. Can be left blank.	Empty string	256 chars max
StartDate	Populates the <b>Start Date</b> field in the <b>Properties</b> tab.	Cell value must be of type <b>DATE</b> in Excel.	NULL	
ModifiedDate	Populates the <b>Modified Date</b> field in the <b>Properties</b> tab.	Cell value must be of type <b>DATE</b> in Excel.	Current time	
ExpirationDate	Populates the <b>Expiration Date</b> field in the	NeverExpire or cell value of type <b>DATE</b> in Excel.	NULL	

Column name	Description	Valid values	Default value	Comments
	<b>Properties</b> tab.			

The following example shows a valid table with data:

TheName	DescriptionSubject	Body	StructuredBody	BodyType	StartDate	ModifiedDate	ExpirationDate
Sales followup	Sent to customers who request contact from Sales	Thank you for contacting us	Thank you for contacting your company. We are happy to assist you with your order.				

### Important

- Columns can appear in any order.
- Default values are assigned if a cell value is missing.
- The following rules apply to dates:
  - If both **StartDate** and **ExpirationDate** are empty, eServices Manager assigns **StartDate** to current date and **ExpirationDate** to NeverExpire.
  - If **StartDate** is empty and **ExpirationDate** is not empty, eServices Manager assigns **StartDate** a value equal to 30 days before **ExpirationDate**.
  - If **StartDate** is not empty and **ExpirationDate** is empty, eServices Manager sets **ExpirationDate** to NeverExpire.
- An error message appears if eServices Manager fails to process one or more standard responses. You can check the GAX logs for more details about the cause of the error.
- eServices Manager assumes that all date properties in your UCS environment are stored in the GMT time zone. These properties are always converted to the local time zone by eServices Manager. However, when importing date properties from an Excel file, dates are not converted to local time. For consistency, Genesys recommends you specify dates in the GMT time zone.

To import the Excel file using eServices Manager:

1. In the **Standard Responses** tab, select a category into which the standard responses will be imported.
2. Click .
3. Select the Excel file to import.

- 4. Click **Next**.

A prompt appears to state whether the import was successful or not. If not successful, the prompt states how many errors were encountered. You can check the GAX logs for more information on the cause of the error(s).

- 5. Click **Finish**.

## Search

You can search for categories, standard responses, field codes, and screening rules, either by name or by specifying various parameters and properties. Some searches also allow the use of regular expressions.

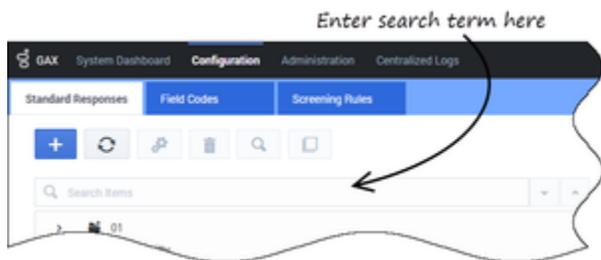
### Tip

Need help with regular expressions? Many possible parameters are documented under Regular expressions on the Screening Rule reference page in this guide.

## Search for categories

You can search for categories in the **Standard Responses** or **Screening Rules** tabs.

Click the search bar and enter a search term to search the list of categories.



## Search for standard responses

In the **Standard Responses** tab, select a category and click  to search for one or more standard responses.

### Tip

Are you unable to click  to search? Remember that you must first select a

category in which to search.

A dialog box appears so you can enter parameters for the search. You can define various parameters for the search by selecting a tab above the search field. In the graphic below, no tabs have a search parameter, as shown by the **0** beside each tab name.



After you define a search parameter in a tab, the value changes to show the number of active search parameters in the tab. For example, in the graphic below, the Text tab has a value of **1**, meaning it has one search parameter, but all other tabs have a value of **0**, meaning these tabs do not have search parameters.

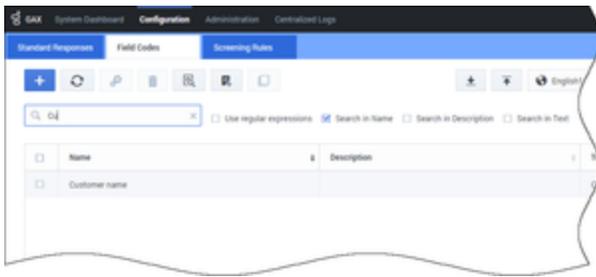


After you define one or more search parameters, click **Find** to begin the search. The **Results** section appears at the bottom of your screen.



## Search for field codes

In the **Field Codes** tab, click  to start a search. Enter a search term in the provided field. You can also specify whether you want to look for the search term in field code names, descriptions, or text. You can also use regular expressions.



You can also search when inserting a field code into a standard response.



### Search for custom variables

You can search for custom variables when you are viewing the **Custom Variables** list.



### Search for screening rules

In the **Screening Rules** tab, select a category and click  to search for one or more screening rules.

#### Tip

Are you unable to click  to search? If you are in the Tree view, you must first select a category in which to search.

A dialog box appears so you can enter a search term. You can select or de-select check boxes to specify whether you want to search in the name or pattern of screening rules. You can also use regular expressions.

After you define one or more search parameters, click **Find** to begin the search. The **Results** section appears at the bottom of your screen.

