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eServices Manager Administrator's Guide

Create and test screening rules

7/27/2024

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- Administrator

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

Related documentation:

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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.

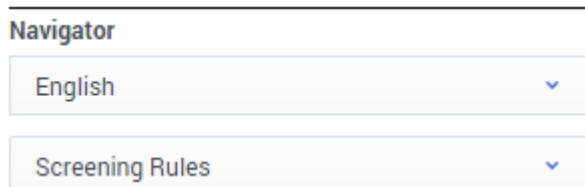
This page contains the following sets of instructions:

- 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**.

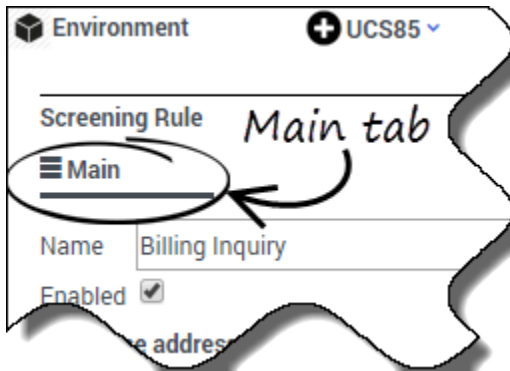


3. On the Category Tree, check the boxes for the categories this Screening Rule should apply to.
4. Click **New**.

-
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.

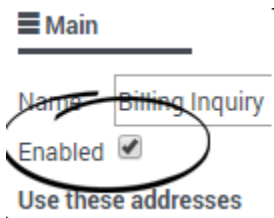
Configuring a Screening Rule

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.



- 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**

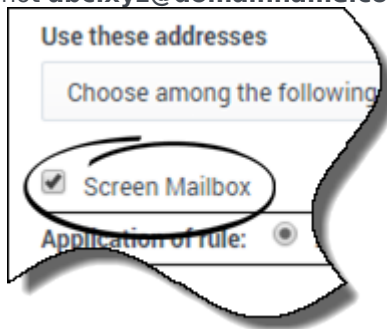
Config Manager: **Tenant > Business Attributes > EmailAccounts > Attribute Values**



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

Does it matter if the address is exact?

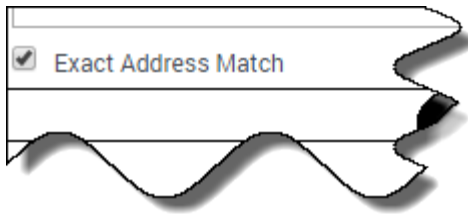
- If so, select the **Exact address match** box. The screening rule looks for messages having that exact address as a destination. For example, **xyz@domainname.com** matches **xyz@domainname.com** but not **abc.xyz@domainname.com**. This match is not case sensitive.



- 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?

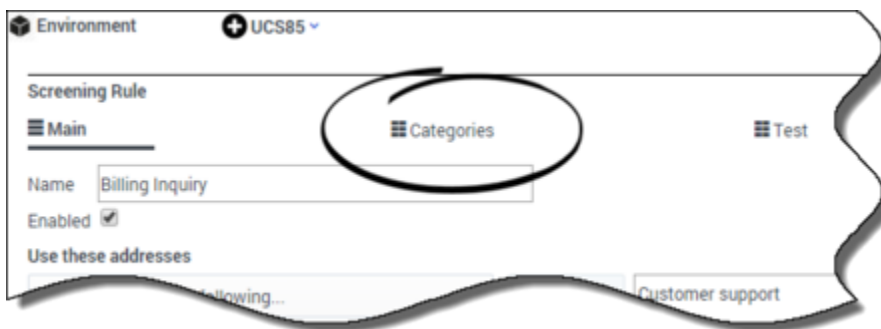
Use the check boxes to have the Screening Rule apply to the message body, subject, header, or any combination. You must select at least one.

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

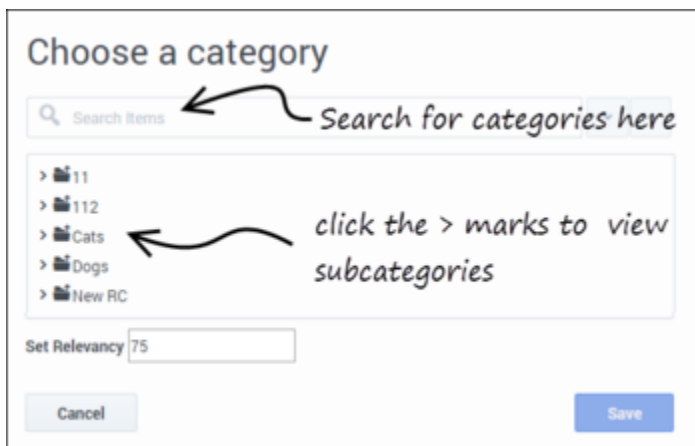
Assign categories and remove category assignments

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, .

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.

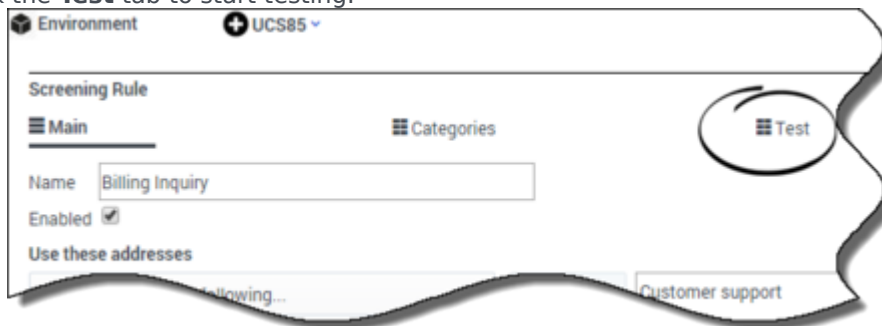
Other details about Service Categories:

- 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.

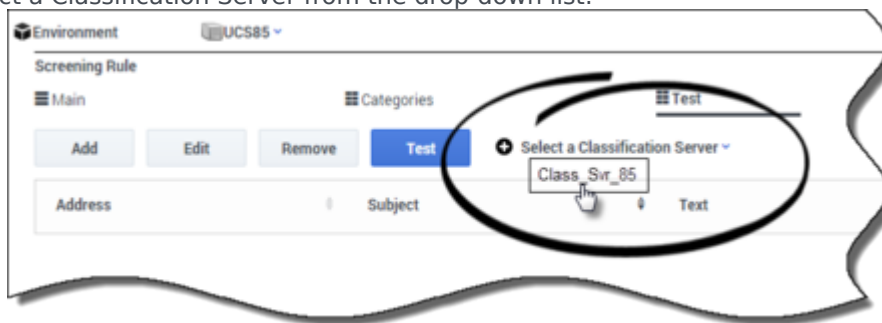
Test a Screening Rule

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.



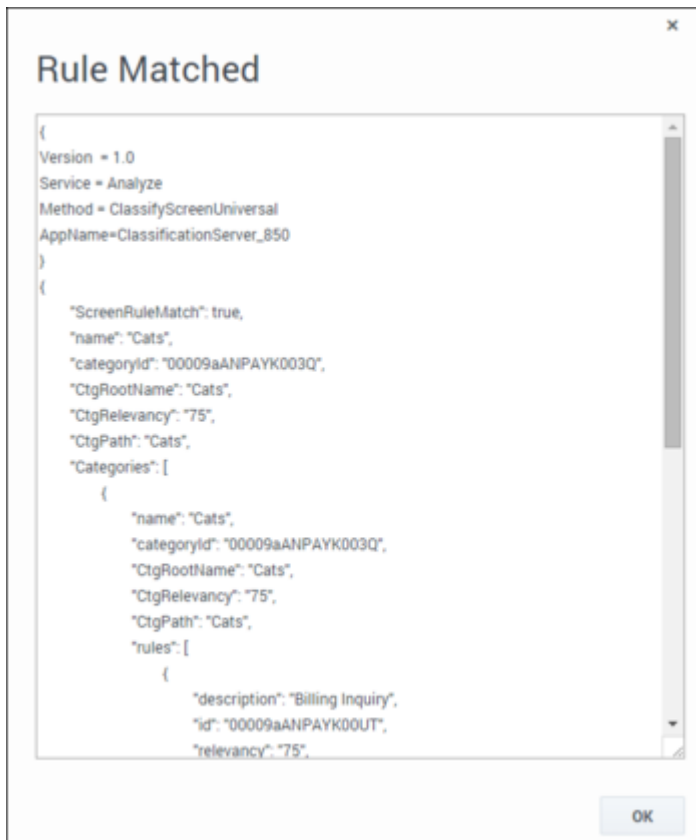
2. Select a Classification Server from the drop-down list.



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.



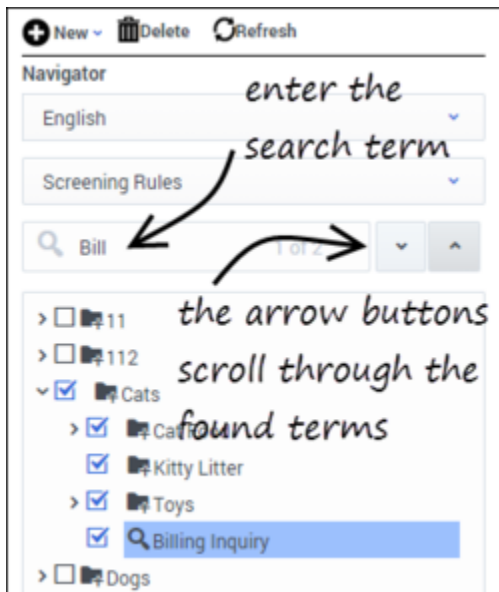
If you get a **Rule Not Matched** message, check the message for clues to the problem. If necessary, analyze your Screening Rule step by step to determine what needs to be edited to make it work the way you want.

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