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eServices Manager Administrator's Guide

Managing and working with objects

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- Administrator

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

Related documentation:


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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:

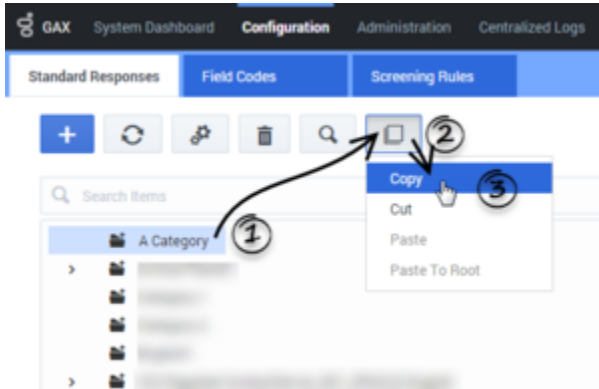
1. Select the target object(s).
2. Click  and select an action (for example, **Copy**).

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.

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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

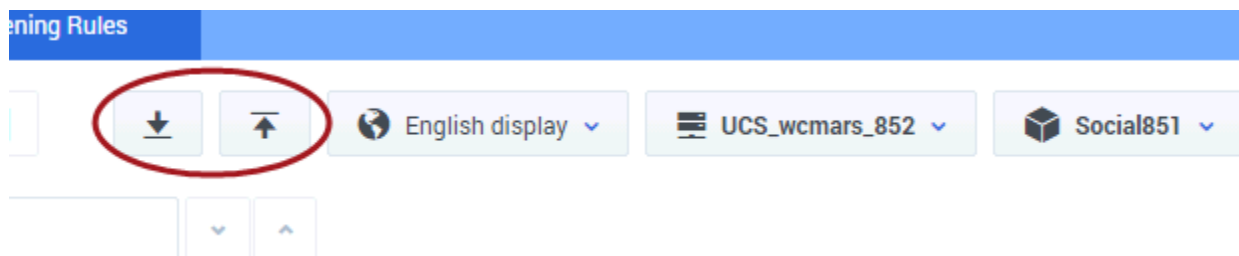
You can export and import categories, standard responses, field codes, screening rules, training data objects, and models (training data objects and models are handled by Genesys Content Analyzer).

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 Name field in the UI.	Any string	Mandatory	128 chars max
Body	Populates the body text in the General tab. Uses plaintext characters only.	Any string	Empty string	unlimited
StructuredBody	Populates the body text in the HTML tab. Uses plaintext characters and HTML.	Any string	Empty string	unlimited
Description	Populates the Description field in the UI.	Any string	Empty string	254 chars max
Subject	Populates the Subject 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 Start Date field in the Properties tab.	Cell value must be of type DATE in Excel.	NULL	
ModifiedDate	Populates the Modified Date field in the Properties tab.	Cell value must be of type DATE in Excel.	Current time	
ExpirationDate	Populates the Expiration Date field in the	NeverExpire or cell value of type DATE in Excel.	NULL	

Column name	Description	Valid values	Default value	Comments
	Properties 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.

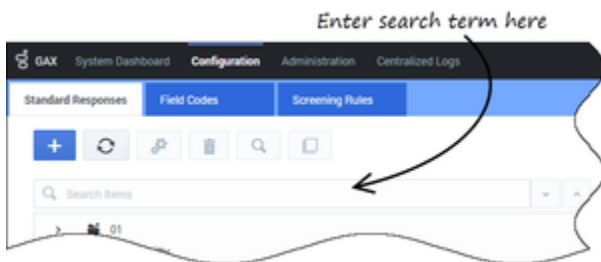
Tip

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.

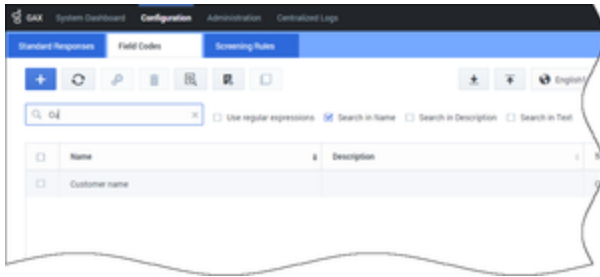


After you define one or more search parameters, click **Find** to begin the search. The **Results** section appears at the bottom of your screen.



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.

