GENESYS™

Genesys Knowledge Management User Guide

Screening Rule Reference

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Screening Rule Reference

This section provides reference information on the following topics relating to screening rules:

- What they check: What Screening Rules Check

- The functions, arguments, and operators used in them: Functions and Arguments

- A pattern builder to help formulate them: Pattern Builder

- Regular expressions to use in them: Regular Expressions

What 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 of [(see See]]. 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. on See 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 l

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

Subject, Body, and Header

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:

  a. Leave subject-body-header set to false.

  b. Open the rule in the Screening Rule Editor.

  c. 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.