



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.

Privacy Manager Plug-in for GAX

Using Privacy Manager

12/16/2025

Contents

- 1 Using Privacy Manager
 - 1.1 Starting
 - 1.2 Creating or Editing a Rule
 - 1.3 Testing a Rule
 - 1.4 Creating, Editing, and Testing RegExes
 - 1.5 Importing and exporting rules
 - 1.6 Limitations

Using Privacy Manager

Starting

1. In GAX Configuration Manager, go to **eServices** and select **Privacy Manager**.
2. Do one of the following steps:
 - a. For 8.5.1 releases and lower, select a UCS. The main Privacy Manager window displays.
 - b. For 8.5.3 releases and higher, you can select a UCS and tenant to use with Privacy Manager.

Select UCS *Select tenant*

Chat Email RegEx

New [Download] [Upload] ContactServer_852_extra Tenant_extra

Status	Name	Order	Description	Replacement Pattern	RegEx	
☒	Credit Card rule for Chat	10	Looks up Credit Card number and replaces all digits	Mask all Digits	Credit Card	[Edit] [Delete]
☒	SSN rule for Chat	20	Looks up SSN number and replaces all digits	Mask all Digits	SSN	[Edit] [Delete]
☒	Phone Numbers rule for Chat	30	Looks up Phone Number and replaces all digits	Mask all Digits	Phone Number	[Edit] [Delete]

Tip

Privacy Manager is designed to be viewed at a minimum screen resolution of 1280x1024, or a full HD resolution of 1920x1080.

Creating or Editing a Rule

- To create a rule, click **New**.
- To edit an existing rule, click the rule name or the Edit icon.

The window that opens is titled either **New Rule/Test Rule** or **Edit Rule/Test Rule**, but in either case the fields and functionality are identical.

Edit Rule

* **Name**

Phone Numbers rule for Email

Description

Looks up Phone Number and replaces all digits

* **Regex**

Phone Number ▼

New

* **Regex Expression**

(?>^|(?<=[\s[:alpha:]](),.,:;!'"`))(\?:\+?1[-.])?(?:\((?[:2-9][0-9]

Replacement Pattern

Mask all Digits ▼

* **Priority**

30

Status

Enabled ▼

Cancel

Save

Test Rule

Test Message

New

Edit

Delete

* **Text**

Test Result

Test

New Rule, Edit Rule, Test Rule

Note the following:

- For **RegEx**, you can either select one of the ready-made regular expressions or open the RegEx Create/Edit window to create a new one.
- For **Priority**, 1 is the first (highest) priority, 2 is next, and so on.

Important

Although it is possible to assign the same priority to multiple rules in the same group, Genesys recommends against doing so.

Testing a Rule

The right-hand pane of the edit/create window allows you to test a rule.

- **Test message** is text that you will try applying the rule to. You can select a ready-made test message or write your own.
- Click **Test** to run the rule on the test message. The results appear in **Test Result**.

Creating, Editing, and Testing RegExes

You can use Privacy Manager to write your own rules and test them, but Genesys also provides hard-coded rules that use the following regular expressions:

Name	Regular Expression
Credit Card (Visa and MasterCard only)	<code>(?:^ (?<=[\D;a-zA-Z(),.:;?!'"`>]))(?:4\d{3} 5[1-5]\d{2} 6011 622[1-9] 64[4-9]\d 65\d{2})[ -.\n\r]{0,10}\d{4}[ -.\n\r]{0,10}\d{4}(?:\$ (?=[\Da-zA-Z(),.:;?!'"`<=]))</code>
Phone Number (North America)	<code>(?:^ (?<=[\D;a-zA-Z(),.:;?!'"`>]))(?:\+?1[ -.\n\r]{0,10})?(?:\([2-9][0-9]{2}\) [ -.\n\r]{0,10})?[2-9][0-9]{2}[ -.\n\r]{0,10}[0-9]{4}(?:\$ (?=[\Da-zA-Z(),.:;?!'"`<=]))</code>
SSN (Social Security Number - U.S. only)	<code>(?:^ (?<=[\D;a-zA-Z(),.:;?!'"`>]))(?:000 666 9)\d{3}[ -.\n\r]{0,10}(?!00)\d{2}[ -.\n\r]{0,10}(?!0000)\d{4}(?:\$ (?=[\Da-zA-Z(),.:;?!'"`<=]))</code>

To create a RegEx,

- Click **New** on the RegEx tab, or
- Click **New** next to the RegEx field in the **New Rule/Edit Rule** window.

To edit a RegEx, click its Edit icon on the **RegEx** tab.

New RegEx

* Name

Description

* Expression

Cancel

Create

Test RegEx

Replacement Pattern

Mask all ▼

* Text

Test Result

Test

New RegEx/Test RegEx

Testing RegExes works in the same way as testing rules.

Importing and exporting rules

Important

- This feature is only available in 8.5.3 releases and higher.
- Your account must have sufficient role privileges to use this feature. Refer to the [Role-Based Access Control](#) section for more information.

You can export and import rule sets as JSON files. This is useful if you want to copy a rule set to another instance of Privacy Manager.

To export a rule set, click . Privacy Manager prepares the JSON file for export. Click **Download** to save the JSON file to your computer.

To import a rule set, click . Select a JSON file and click **Import**.

Privacy Manager does not overwrite existing rules when you import a rule set. For example, if you import a rule set and a rule name matches one that already exists, Privacy Manager appends **Copy_1_of_** to the imported rule name (for example, **Credit Card rule for Chat** becomes **Copy_1_of_Credit Card rule for Chat**).

Limitations

Genesys recommends that you observe the following limits:

- RegEx: no more than 400 per Tenant
- Test Messages per RegEx: no more than 20
- Rules per Group: no more than 200