

GENESYS

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Privacy Manager Plug-in for GAX

Using Privacy Manager

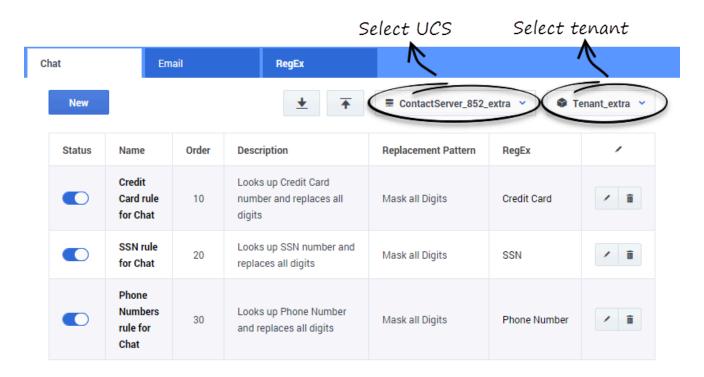
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Using Privacy Manager

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.



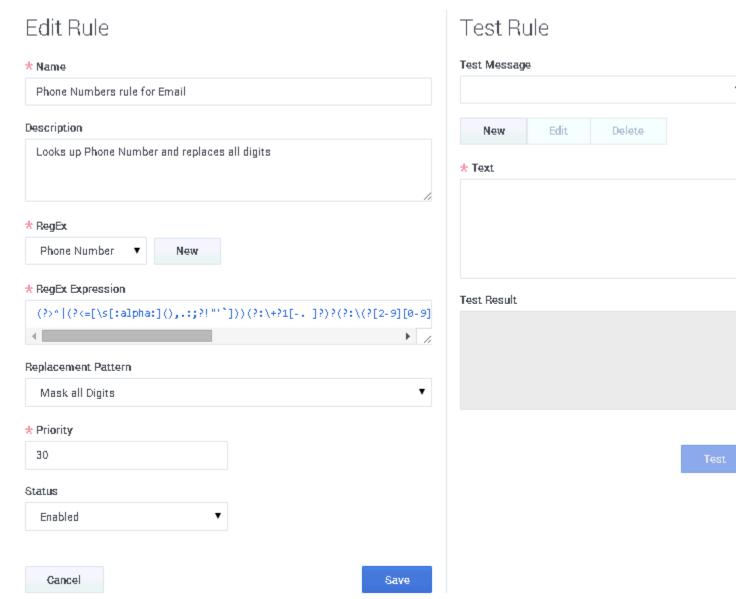
Tip

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.



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

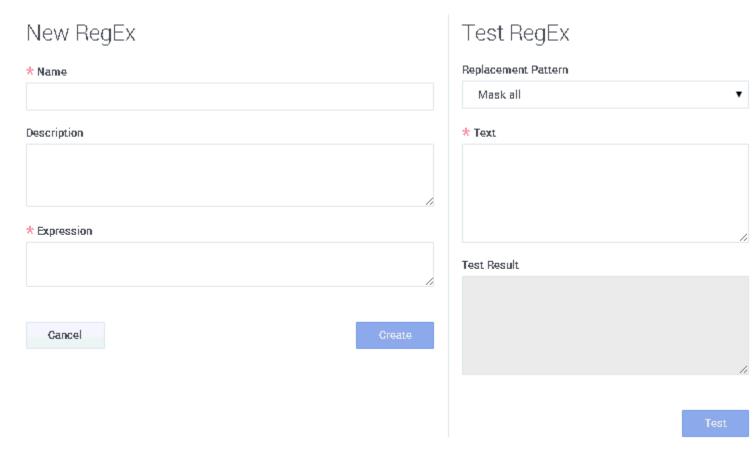
You can use Privacy Manager to write your own rules and test them, but Genesys also provides hard-coded rules that use the following regular expressions:

Name	Regular Expression
Credit Card (Visa and MasterCard only)	(?:^ (?<=[\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}[=\n\r]{0,10}\d{4}(?:\$ (?=[\Da-zA-Z(),.:;?!"'`<=]))
Phone Number (North America)	(?:^ (?<=[\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(),.:;?!"'`<=]))
SSN (Social Security Number - U.S. only)	(?:^ (?<=[\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(),.:;?!"'`<=]))

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/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