Privacy Manager Plug-in for GAX

Using Privacy Manager

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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.

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)	`(?:^|(?<=[\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 [icon]. Privacy Manager prepares the JSON file for export. Click **Download** to save the JSON file to your computer.

To import a rule set, click [icon]. 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