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# Genesys Knowledge Management User Guide

Procedure: Creating a Screening Rule

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# Procedure: Creating a Screening Rule

**Purpose:** To create or edit a screening rule.

1. Go to the Screening tab.
2. Do one of the following:
  - Select New from the File menu.
  - Right-click anywhere on the Screening tab and select New.
  - Select an existing screening rule and double-click or select Edit from the File menu.

The Screening Rule Editor opens, as shown in "Screening Rule Editor." If you are creating a new screening rule, the title of the dialog box is New Screening Rule; if you are editing an existing rule, its title is Edit Screening Rule.

**Edit Screening Rule**

Name:

☒ Enabled Order:

Use these addresses:

customer\_support  
 tech\_support  
 warranty\_support

Add

☐ Screen mailbox ☐ Exact address match

☒ AND ☐ OR

Use pattern

Choose and add regular expressions and operators between them:

Find(\*) Add && Add

Find(\*transaction\*,true) && Find(\*amount\*,true) && (Find(\*wrong\*,true) || Find(\*different\*,true) || Find(\*doesn't match\*,true) )

Search for pattern in message's ☒ Subject ☒ Body ☒ Header

☐ Merge sources checked above

Categories

Add	Root category	Category	Relevancy
Delete	Financial service	Errors in transactions	75

Test against whole database ☒

Test messages

Add new  
 Delete  
 Test rule

Subject

### Screening Rule Editor

- Create or edit a name for the rule, observing the limitations on Knowledge Manager names. Names of categories, like those of all Knowledge Manager objects, can consist only of alphanumeric characters (A-Z, a-z, 0-9), plus the characters shown in [Procedure: Creating a New Category, "Characters Allowed in Object Names."](#)
- Use the Enabled check box to enable and disable the rule. The rule must be enabled in order to be available when you add a Screen object to a routing strategy. However, once a strategy includes a Screen object that uses a particular screening rule, disabling the rule does not prevent the strategy from using the rule.

- Use the **Order** box to specify the order in which you want this rule to apply with respect to other screening rules. This ordering applies only in a Multiscreen routing object in which **All** rules is selected.
- In the **Use these addresses** area, select an address from the left-hand window, then click **Add** to copy it to the right-hand window.
  - With the **Exact address match** box cleared, the rule looks for messages having that address as a substring of their destination address. For example, `xyz@domainname.com` matches `abc.xyz@domainname.com` and `xyz@domainname.com`.
  - With the **Exact address match** box selected, the screening rule looks for messages having that exact address as a destination. For example, `xyz@domainname.com` matches `xyz@domainname.com` but not `abc.xyz@domainname.com`. This match is not case sensitive.

### Important

The e-mail addresses listed in the left-hand window of **Use these addresses** are defined in this configuration database object: **Business Attributes > EmailAccounts > Attribute Values > Annex > general > address**.

Instead of moving addresses from the left-hand window to the right-hand, you can directly type an address in the right-hand window.

You may leave the right-hand window empty, in which case the rule ignores the address in matching.

- Still in the **Use these addresses** area, select **Screen mailbox** to make the rule match the POP box from which the e-mail entered the eServices system, rather than the **To** field of the e-mail itself. The difference is that each e-mail enters the system from exactly one mailbox, while the **To** field can contain multiple addresses.

### Important

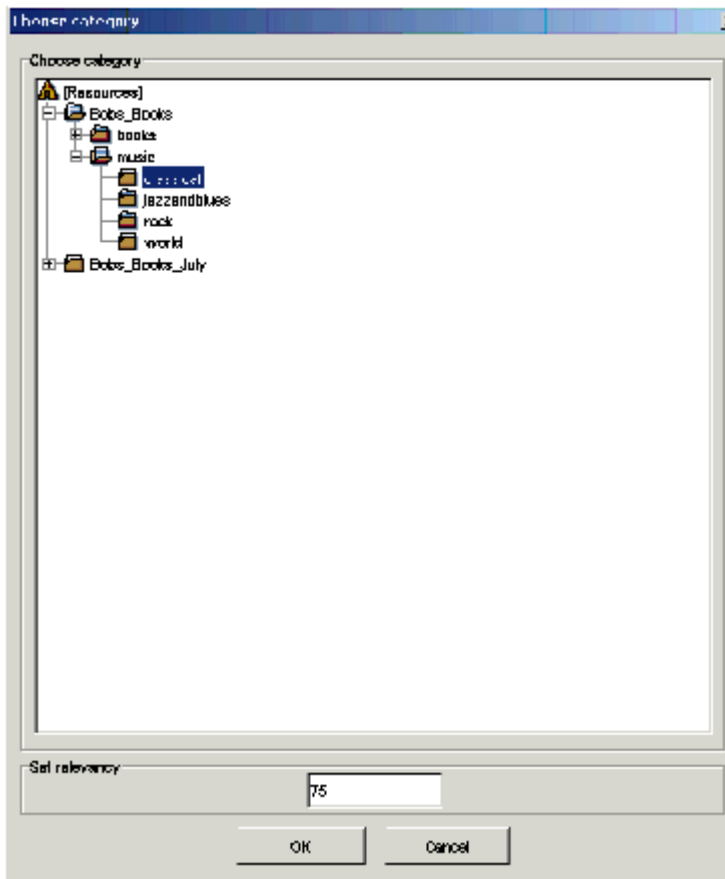
For this feature to work as expected, the **E-mail Server enable-same-mail-from-mailboxes** option must be set to **true**. With this setting, E-mail Server creates a separate interaction for each address in the **To** field (that is, for each mailbox that it pulls the e-mail from when it creates the interaction).

- Select **AND** or **OR** radio buttons:
  - **AND** —Match the addresses selected in **Use these addresses** *and* match the pattern defined in **Use pattern**. In the **Use pattern** area, compose the rule, using the drop-down lists for functions and operators. See Step 9.
  - **OR** —Match the addresses selected in **Use these addresses** *or* match the pattern defined in **Use pattern**. In the **Use pattern** area, compose the rule, using the drop-down lists for functions and operators. See Step 9.
- In the **Use pattern** area, compose the rule, using the drop-down lists for functions and operators. See **Functions and Arguments** for an explanation of how to construct rules.
- 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.

With multiple check boxes selected, there are two ways that a screening rule can behave. Use the Merge sources checked above checkbox as one way to control this; see [Screening Rules Reference: Subject, Body, and Header](#) for an explanation.

- In the Categories area, associate the screening rule with a category:
  - a. Click Add. The Choose category dialog box appears, as shown in Choose Category.



### Choose Category

When an interaction matches this screening rule, the results are similar to classifying it using Genesys Content Analyzer: it receives a category name and a confidence level. The confidence level indicates that the system is x percent confident that this interaction belongs in this category. With Content Analyzer, the system assigns the category and confidence level. But with a screening rule, it is up to you, the user, to decide what category the

interaction belongs to and how confident you are of that categorization.

Do so as follows:

- Select the category you want to associate the screening rule with.
- Set the relevancy in the Set relevancy box.

### **Next Steps**

- [Test the Screening Rules.](#)