GENESYS™

Genesys Knowledge Management User Guide

Importing Knowledge Management Objects
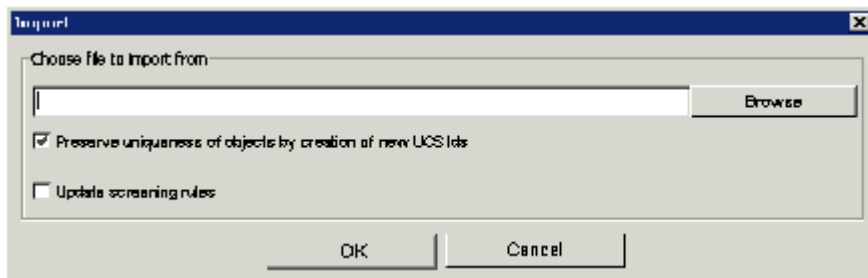
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Importing Knowledge Management Objects

You can import categories, standard responses, field codes, screening rules, training objects, and models (training objects and models are restricted to Genesys Content Analyzer; see Genesys Content Analyzer for more information.

Use exported files as backups or to transfer objects between environments.

> ## Important
> At this time you cannot import or export FAQ objects.

1. On any tab, select `Import`. The `Import` dialog box opens, as in "Import Dialog Box."

Import Dialog Box

2. Browse to the file that you want to import, or enter its path and name.

   The check box `Preserve uniqueness of objects by creation of new UCS Ids` controls whether the imported records receive new database IDs. Genesys strongly recommends that you leave this check box selected; otherwise, the imported records keep their old IDs and there is a risk of creating uniqueness conflicts. It is only safe to keep old IDs when you are importing into an empty database. One reason to keep the old IDs would be to preserve compatibility with non–Knowledge Manager components (such as a routing strategy) that need to refer to them.

   > ## Important
   > If the Preserve uniqueness check box is cleared and an imported object comes in with an ID that is identical with an existing object's ID, the import process

> cancels.

The check box `Update screening rules` controls whether imported screening rules overwrite existing screening rules with the same name. If this check box is not selected, screening rules are treated like all other Knowledge Management objects, as described in the preceding paragraph. If the check box is selected, screening rules are treated differently from all other objects: If the names match, the imported screening rule replaces the existing one.

Important

If the imported rule's name does not match any existing rule but its database ID happens to match that of an existing rule, then Knowledge Manager creates a new ID for the imported rule.

- If a root category being imported has the same name as an existing category, Knowledge Manager asks you to change the name of the category being imported.

If other objects have the same name as existing objects, Knowledge Manager appends _<hms> to the name of the imported object. <hms> is a timestamp where h is the hour (using a 12-hour clock),m is the minutes, ands is the seconds. Each unit may be one or two digits; there is no padding. For example, if at 4:25:07 PM you import a screening rule called `Sales`, and there is also an existing rule called `Sales`, the new name of the imported rule is `Sales_4257`.

Important

This adds between four and seven characters to the name of the object. You should be especially careful of this if any imported object's name is more than 58 characters long: the added characters may produce a new name that violates the 64-character limit on names of Knowledge Management objects. Importing may fail on objects with names that are too long.

- Click `OK`. All objects in the selected file are imported.

- A message appears reporting on any errors or warnings encountered, see "Import Results Message."

Import Results Message