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eServices Manager Plug-in for GAX

Importing and Exporting Objects

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Importing and Exporting Objects

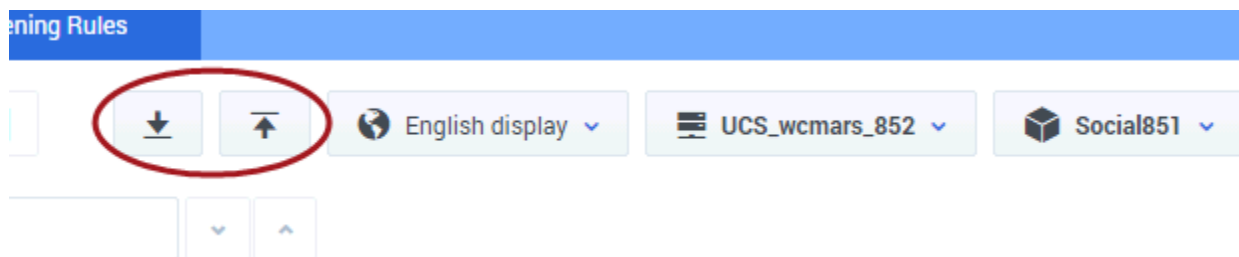
You can export and import categories, standard responses, field codes, screening rules, training data objects, and models (training data objects and models are handled by **Genesys Content Analyzer**).

Important

There are two exceptions: **test messages** and **custom variables** cannot be imported or exported

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

The import and export buttons are at the upper right of the eServices Manager window, next to the dropdowns for language, UCS, and tenant. Export is the down arrow, and Import is the up arrow.



Export

The process of exporting is simple. After you click the Export icon, series of windows allows you to select:

- Root categories (and their associated category trees)
- Training Data Objects
- Models
- Screening rules

At the beginning, you decide whether the category tree(s) that you select will also include their associated Standard Responses and Field Codes.

The resulting file has the extension .kme.

Import a KME file

Clicking the Import icon takes you through these windows:

1. **Import - Select file and options.** Click **Select** to navigate to the KME file you want to import. See below for explanations of the options **Update screening rules** and **Create new UCS ids** (selected by default).
2. **Import - Edit category names**
If the import file includes any category that has the same name as an existing category, eServices Manager asks you to rename the incoming category.
3. **Import - Process import file**
This simply shows the progress of the import process.

Note the following:

- The check box **Create 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-eServices Manager components (such as a routing strategy) that need to refer to them.

Important

If the **Create new UCS Ids** 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 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.
- If an imported screening rule's name does not match any existing rule, but its database ID happens to match that of an existing rule, then eServices Manager creates a new ID for the imported rule.
- If a root category being imported has the same name as an existing category, eServices Manager asks you to change the name of the category being imported.
- If other objects have the same name as existing objects, eServices 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, and s 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 eServices Manager objects](#). Importing may fail on

objects with names that are too long.

- If a Training Data Object contains no training messages, it cannot be imported.

Warning

Once you import an archive that includes any Training Data Object, you cannot import the archive again to a different language. If you attempt to do so, you will receive a message asking you to change the root category name, but when you do that you receive an error message saying that a Training Data Object with that name already exists.

As a workaround, you can rename the Training Data Object before importing the second time.

Import an Excel file

You can perform a bulk import of standard responses from Excel files, including .xls (Excel 1997-2003) and .xlsx. Other formats are not supported.

The Excel file must use the columns listed in the table below, and these columns must appear in the first row of the first worksheet. All other data is ignored.

Column name	Description	Valid values	Default value	Comments
TheName	Populates in the Name field in the UI.	Any string	Mandatory	128 chars max
Body	Populates the body text in the General tab. Uses plaintext characters only.	Any string	Empty string	unlimited
StructuredBody	Populates the body text in the HTML tab. Uses plaintext characters and HTML.	Any string	Empty string	unlimited
Description	Populates the Description field in the UI.	Any string	Empty string	254 chars max
Subject	Populates the Subject field in the UI.	Any string	Empty string	512 chars max
MimeType	Defines the mime	Not verified during	Empty string	256 chars max

Column name	Description	Valid values	Default value	Comments
	type of the standard response.	the import process. Can be left blank.		
StartDate	Populates the Start Date field in the Properties tab.	Cell value must be of type DATE in Excel.	NULL	
ModifiedDate	Populates the Modified Date field in the Properties tab.	Cell value must be of type DATE in Excel.	Current time	
ExpirationDate	Populates the Expiration Date field in the Properties tab.	NeverExpire or cell value of type DATE in Excel.	NULL	

The following example shows a valid table with data:


TheName	Description	Subject	Body	StructuredBody	BodyType	StartDate	ModifiedDate	ExpirationDate
Sales followup	Sent to customers who request contact from Sales	Thank you for contacting us	Thank you for contacting your company. We are happy to assist you with your order.					

Important

- Columns can appear in any order.
- Default values are assigned if a cell value is missing.
- The following rules apply to dates:
 - If both **StartDate** and **ExpirationDate** are empty, eServices Manager assigns **StartDate** to current date and **ExpirationDate** to NeverExpire.
 - If **StartDate** is empty and **ExpirationDate** is not empty, eServices Manager assigns **StartDate** a value equal to 30 days before **ExpirationDate**.
 - If **StartDate** is not empty and **ExpirationDate** is empty, eServices Manager sets **ExpirationDate** to NeverExpire.
- An error message appears if eServices Manager fails to process one or more standard responses. You can check the GAX logs for more details about the cause of the error.

- eServices Manager assumes that all date properties in your UCS environment are stored in the GMT time zone. These properties are always converted to the local time zone by eServices Manager. However, when importing date properties from an Excel file, dates are not converted to local time. For consistency, Genesys recommends you specify dates in the GMT time zone.
- After you import standard responses using an Excel file, eServices Manager initializes the following properties as **Manual**, regardless of whether the Excel file contained other values: **AckUsageType**, **AutoRespUsageType**, **AgentDesktopUsageType**, **WSSUsageType**, **EmailOutUsageType**, and **VoiceAutoRespUsageType**.

To import the Excel file using eServices Manager:

1. In the **Standard Responses** tab, select a category into which the standard responses will be imported.
2. Click .
3. Select the Excel file to import.
4. Click **Next**.
5. A prompt appears to state whether the import was successful or not. If not successful, the prompt states how many errors were encountered. You can check the GAX logs for more information on the cause of the error(s).
6. Click **Finish**.