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Genesys Rules Authoring Tool Help

Importing Rules Packages

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Importing Rules Packages

You can import an entire rule package containing the rule definitions, business calendars and test scenarios for that rule package, from an .XML file.

If it is necessary to import the rule templates, you should import them prior to importing the rule packages, since the rule packages make references to the templates that they use.

It is not necessary to import the rule templates if you are importing or exporting from the same system (for example, backing up or restoring a rule package) or from an equivalent system (for example, a lab versus a production environment). However, if you are importing the rule package to a new system or sending it to Genesys for service, you should export both the rule templates and the rule packages so that, when imported, all referenced templates are available in the target system.

Important

The **last-modified-by** date and all rule audit history are not part of the rule package (or rule) export. So, when re-importing an exported rule package, the user doing the importing becomes the new owner of each rule created. Package and rule history are not maintained. The imported rules is considered a new rule package with new history starting from the point of import.

Refer to **Importing Rule Templates** for details on how to import rule templates.

Importing rule packages enables you to do the following:

- Copy an entire rules configuration from a test environment to a production environment.
- Perform a backup of the entire rules configuration before performing a Genesys Rules System upgrade

Important

To import a rule package, you must have Create Package and Create Business Calendar permissions.

To import a rule package:

1. Select the Tenant to which the rule package belongs from the drop-down list.
2. In the Explorer Tree, select **New Rules Package** under the appropriate Solution.
3. Click **Import Rule Package**. A dialog box opens in which you to enter the **Package Name** and the **Business Name**, and select the .xml file to be imported.

4. Check **Auto-save each rule** to auto-save each rule on import. This option should only be used if the rule package is known to be valid on the target system, such as when copying between two identical systems (a lab versus a production environment). Auto-save commits each rule in the package without validating that it matches the underlying templates. If you do not use this option, each rule is imported in the draft state and must be saved manually. This method shows any validation errors and gives the rule author the opportunity to fix them before deployment.
5. **If your business hierarchy is non-nested**, check **Auto-create business hierarchy during import** to tell GRAT to automatically create any missing nodes in your business hierarchy for rules that are contained within the .xml file. For example, if this option is selected, during the import if there is a rule that is associated with the “Widget Sales” department, but no such department is defined in the business hierarchy, GRAT will attempt to create it during the import operation. The GRAT user who is performing the rule package import must have permission to create this folder. If the box is not checked and there are rules associated with missing nodes, the import will fail.

If your business hierarchy is nested, and you select the **Auto-create business hierarchy during import** during the import process, GRAT ensures that both business structures are compatible, and prevents an import if it they are not, and displays an error message informing you that the business hierarchy is not compatible with the imported rule package.

Important

Even if the **Auto-create business hierarchy during import** button is selected, GRAT prevents the same node name from being created anywhere in the hierarchy—uniqueness of business node names across the entire hierarchy is still enforced.

6. Click **Import**.