Genesys Knowledge Center User's Guide

Knowledge Center 8.5.0

3/14/2022

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Welcome

> **Important**
>
> Genesys Knowledge Center is now available as a restricted offering. You must contact your Genesys representative to see if Genesys Knowledge Center is suitable for your environment and business needs. The documentation here anticipates a larger rollout of Genesys Knowledge Center in late 2015.

Welcome to the *Genesys Knowledge Center 8.5.0 User's Guide*. This document provides procedures and instructions for common tasks you need to perform when administering, authoring, and using the knowledge that Genesys Knowledge Center provides. See the summary of chapters below.

Agent Assisted Knowledge	**Authoring**
Working with Knowledge Center Plugin for Genesys Workspace Desktop Edition	Learn how to use Knowledge Center CMS
Knowledge Center Plugin for Workspace Desktop Edition	Using the CMS to Work with Knowledge Bases

Reporting

Find information to help you understand reporting capabilities added to Pulse

Using the Pulse Plugin

Knowledge Center Plugin for Workspace Desktop Edition

Integrating Knowledge Center with Workspace Desktop Edition

Overview

The Knowledge Center Plugin for Workspace Desktop Edition enables your agents to:

- Browse a customer's search history while they work with the accepted interaction
- Search for answers to a customer's questions in the Knowledge Center knowledge base and copy any relevant answers to the reply
- Copy Found Answers to a Reply
- Suggest answers for missing questions in knowledge base

> **Important**
>
> To work with Knowledge Center plugin the agent must have **Knowledge.Worker** privileges.
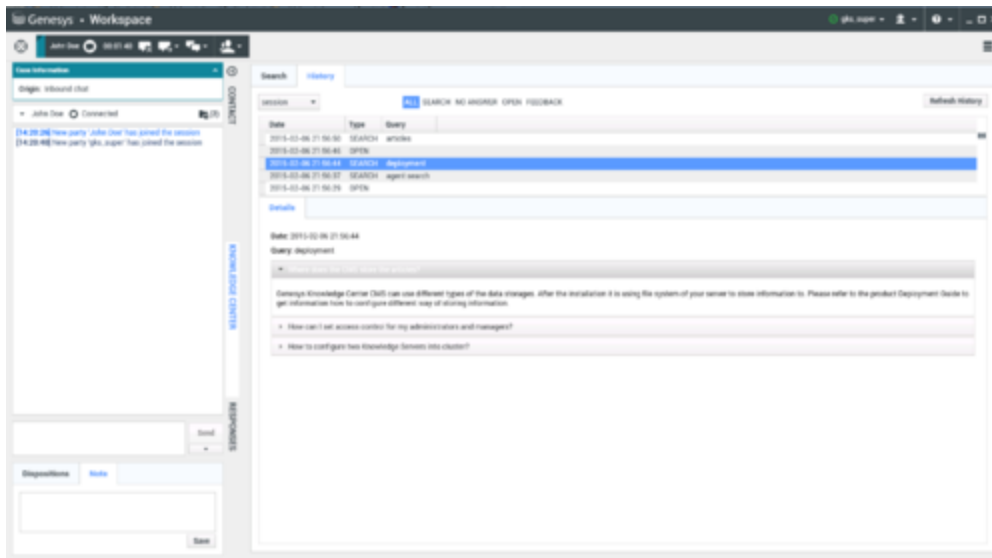
Browsing Customer's Search History
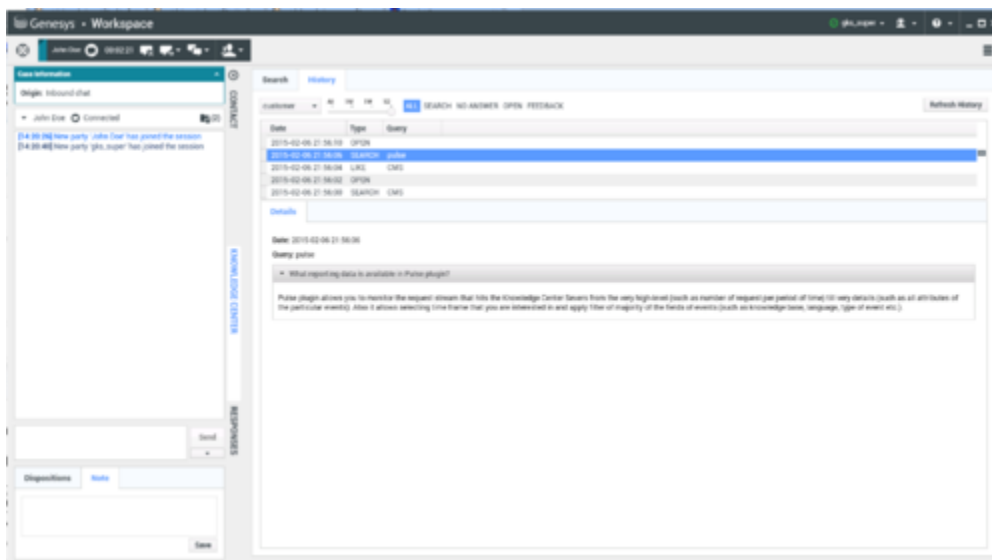
Prerequisites

- The incoming interaction has been accepted.

Start

1. Go to the **Knowledge Center** tab.
2. Open the **History** tab.
3. Browse either the customer's search history from the current session or the customer's entire search history (by choosing either **Session** or **Customer** in the drop-down).

Browsing a Customer's Search History for the Current Session
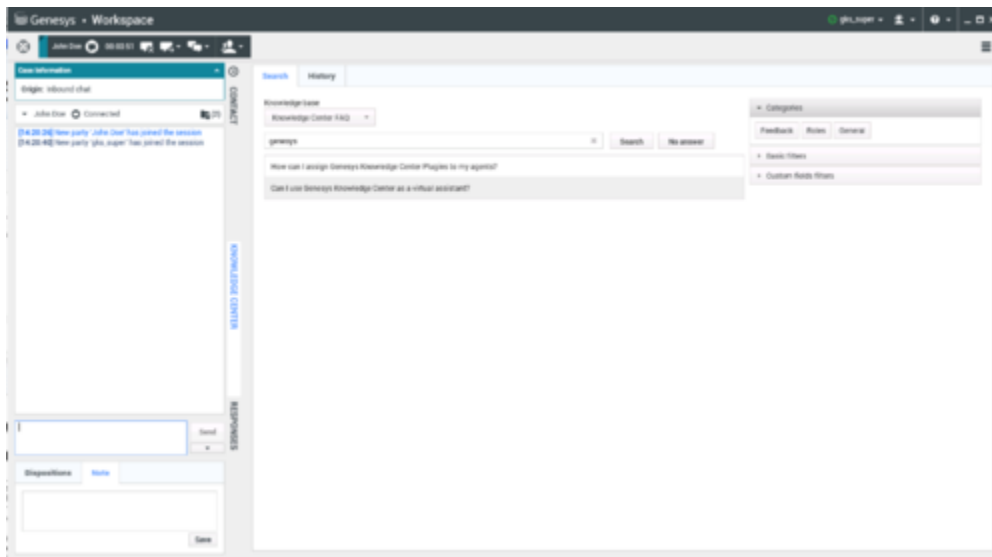

Browsing a Customer's Entire Search History

End

Searching for Answers in a Knowledge Base

**Prerequisites**

- The incoming interaction has been accepted.

Start

1. Go to the **Knowledge Center** tab.
2. Open the **Search** tab.
3. Enter the search term and either click the **Search** button or hit **Enter**.
4. Knowledge Center will provide the appropriate search results.

Searching for Answers in the Knowledge Center Knowledge Base

5. You can filter these search results by using the filters that appear on the left side of the **Search** tab.

End

Copying Found Answers to Reply

Prerequisites

- The incoming interaction has been accepted.

Start

1. Go to the **Knowledge Center** tab.
2. Open the **Search** tab.
3. Enter the search term and either click the **Search** button or hit **Enter**.
4. Choose an answer.
5. Click the **Copy content** button.
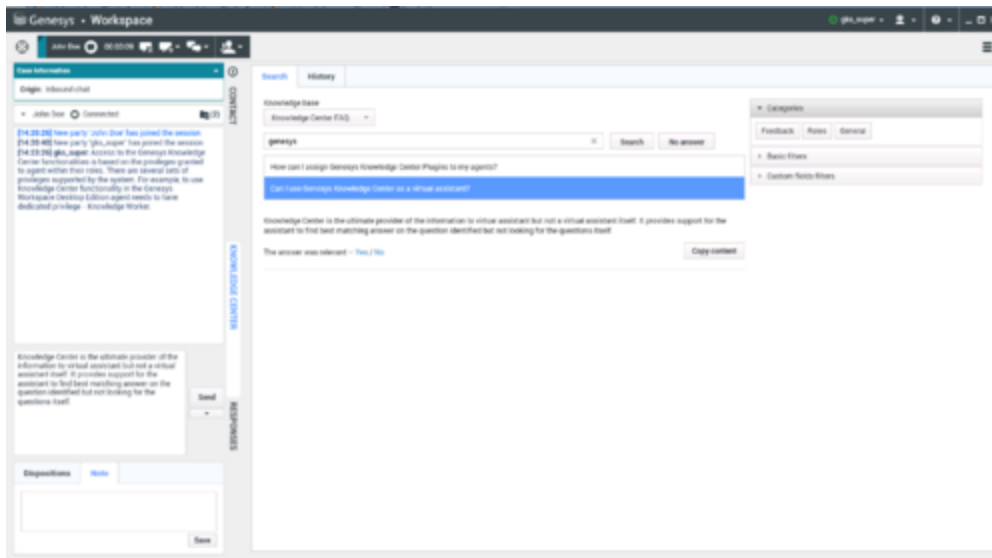
Copying Answers to a Reply

End

Suggesting an answer for missing questions in knowledge base

Prerequisites

- The incoming interaction has been accepted.

Start

1. Go to the **Knowledge Center** tab.
2. Open the **Search** tab.
3. Enter the search term and either click the **Search** button or hit **Enter**.
4. Click **No answer** button.
5. Click **Yes** when asked "Do you want to compose the answer for the question?".
6. Compose the answer, set the appropriate categories, and submit the answer by clicking **Confirm**.
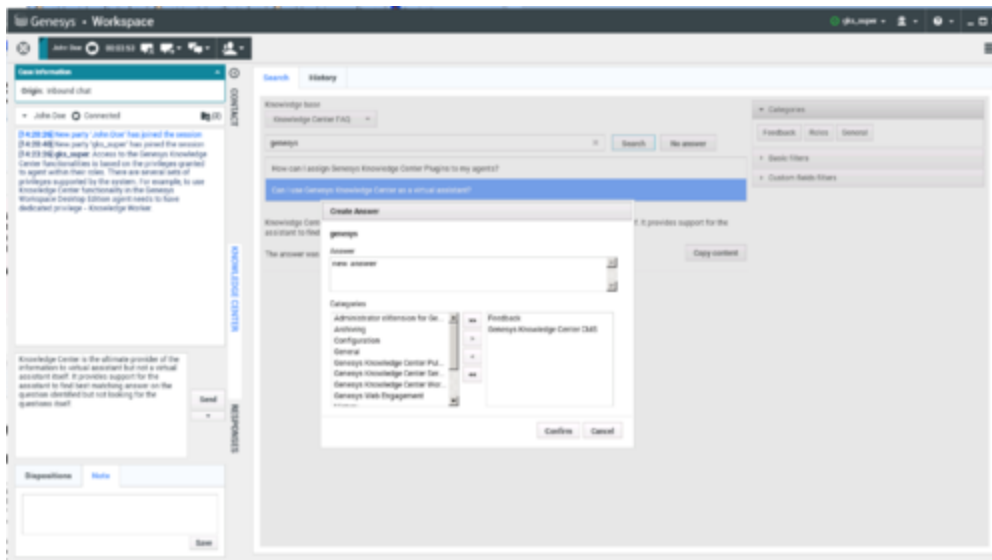
Creating New Answers for Unanswered Questions

7. You can copy the new answer as a reply to the customer by clicking **Yes** when asked, "Do you want to post answer to customer?".

8. The answer will be stored locally during the agent's working session.
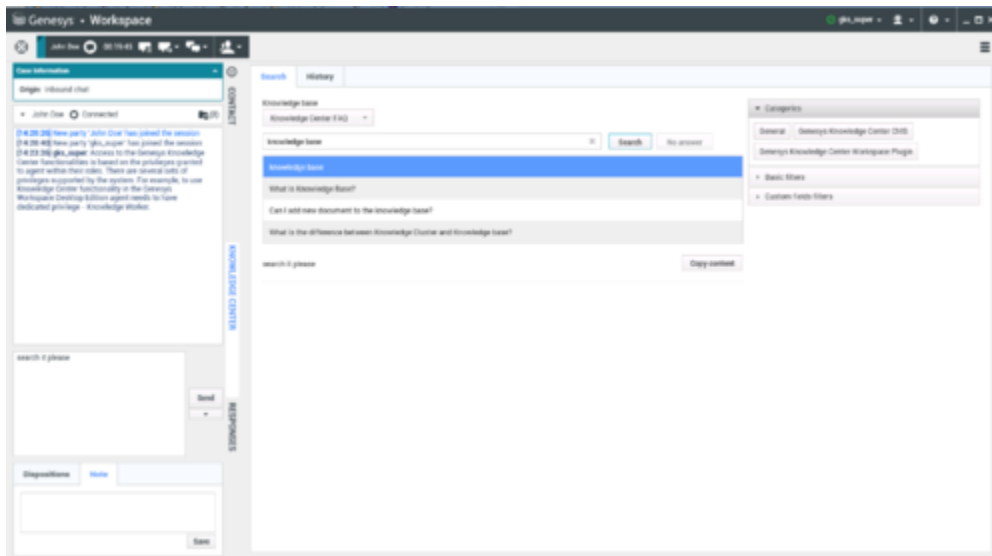
Storing New Answers

End

Using the CMS to Work with Knowledge Bases

Overview

After logging in, you can use the Genesys Knowledge Center CMS to:

- Work with Knowledge Base (create, update, and delete knowledge bases)
- Work with Categories (assign categories to the documents in knowledge base)
- Work with Documents (create, update, and delete the contents of your knowledge bases by authoring questions and answers)
- Export Knowledge base to Knowledge Center Server
- Work with Customer Feedback

Logging Into the CMS

Prerequisites

- A user with Knowledge Server CMS privileges has been created in Config Server.

Start

1. Enter your user name and password and press the **Log In** button.

Genesys Knowledge Center CMS Login

End

Working with Knowledge Bases

Creating a New Knowledge Base

Prerequisites

- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Click the **+** sign on the main page.
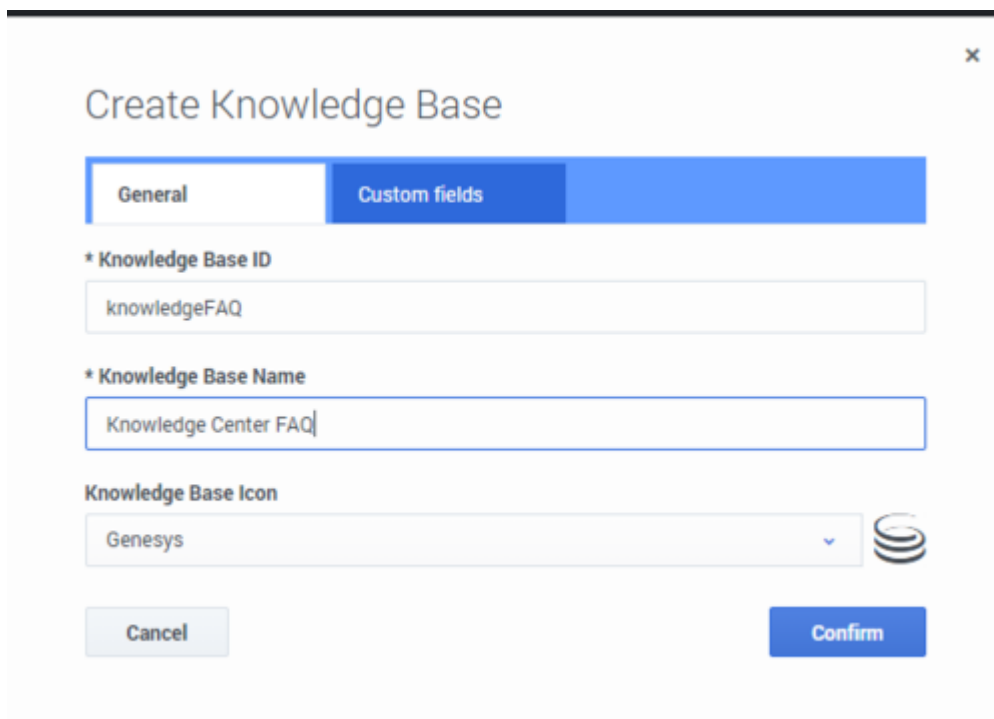
Adding a Knowledge Base

2. The **Create Knowledge Base** window appears.

   On the **General** tab:
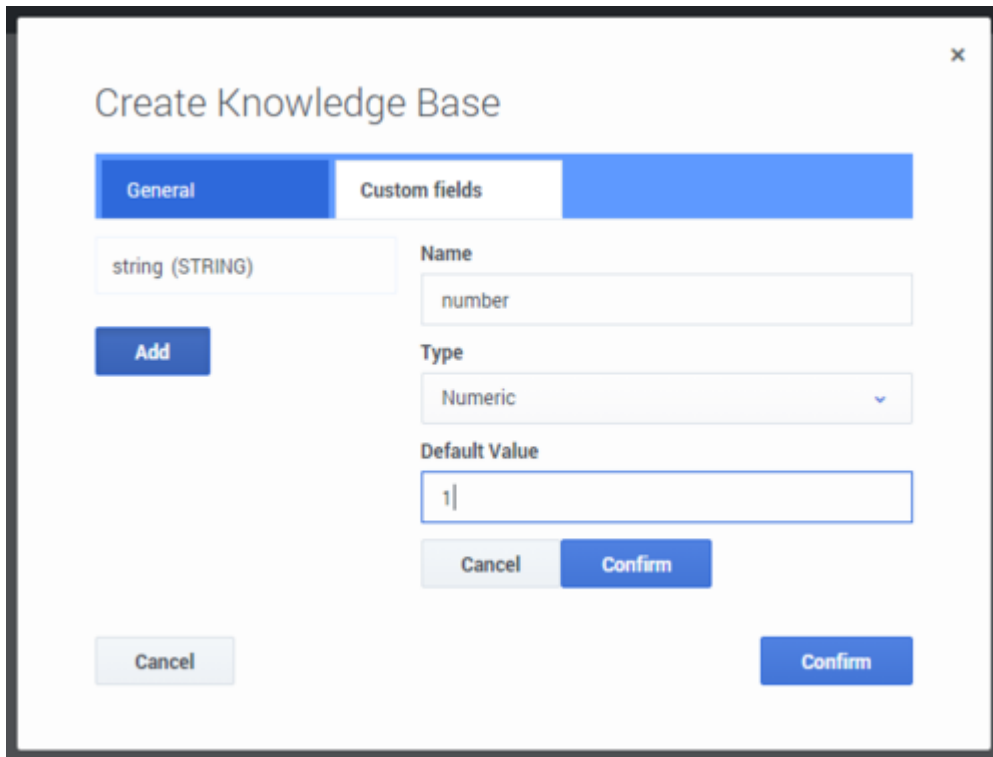
   - Enter the unique knowledge base ID (the ID should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters).

   - Enter knowledge base name (maximum length of 50 characters).

   - If you want to, you can also change the default icon assigned to the knowledge base.

Creating a Knowledge Base

3. To add custom fields, navigate to the **Custom Fields** tab and perform the following actions for each custom field:

   - Press the **Add** button.

- Enter the unique name of the field (the name should consist only of numbers, Latin letters and underscores, with a maximum length of 50 characters).

- Choose the field type.

- Enter a default value, if you would like the field to have one.

- Press the **Confirm** button.

Confirm Knowledge Base Creation

4. Click **Confirm** to create the new knowledge base.
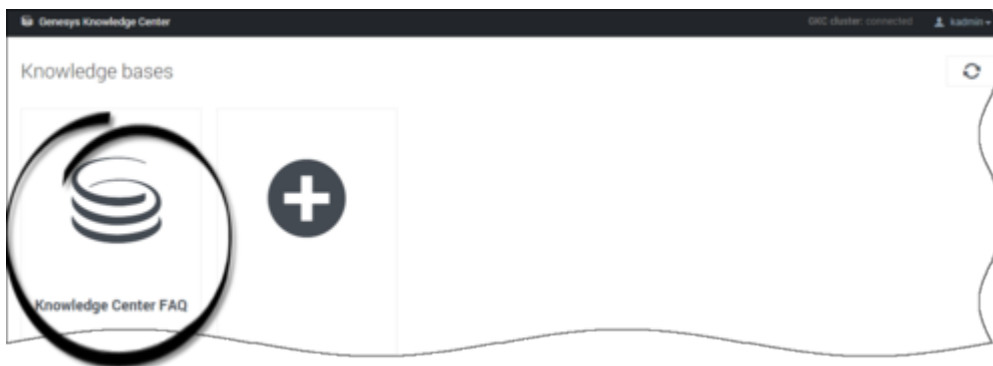
Knowledge Base Now Available

End

Deleting a Knowledge Base

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
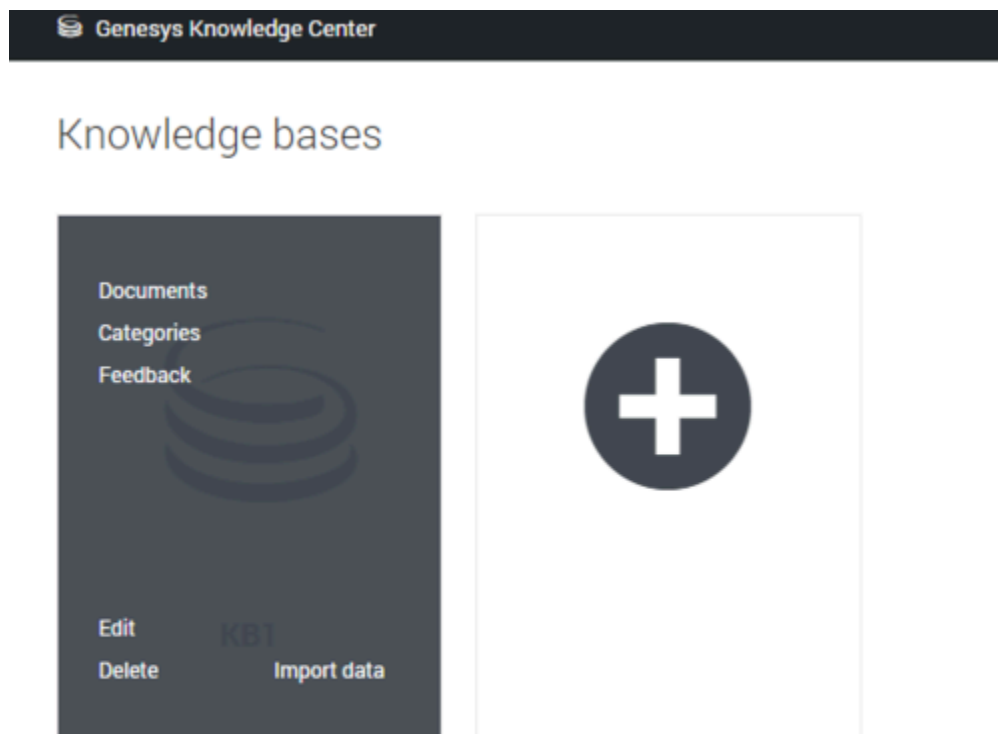
Deleting a Knowledge Base

2. Click **Delete** and confirm the action in the dialog box.

End

Editing a Knowledge Base Definition

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Administrator** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Edit**.
3. The **Edit Knowledge Base** window appears.
4. Press **Confirm** to save your changes.

End

Importing Initial Documents

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Document.Author** or **Knowledge.CMS.Category.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Import data**.
3. Browse to the appropriate XML file.
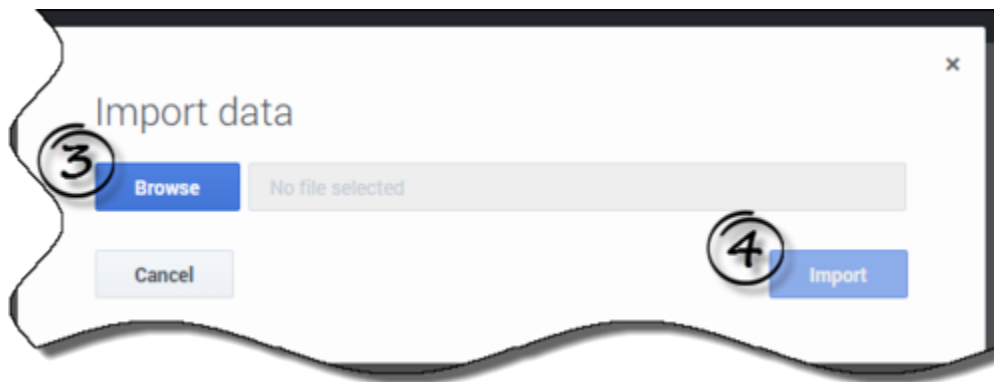
Importing Knowledge Base Data

4. Click **Import**; your data be will imported into the CMS.

End

Working with Categories

Creating a New Category

Prerequisites

- The knowledge base has been defined in the CMS.
- **Knowledge.CMS.Category.Author** privileges have been assigned to the user.
- No category has been selected.
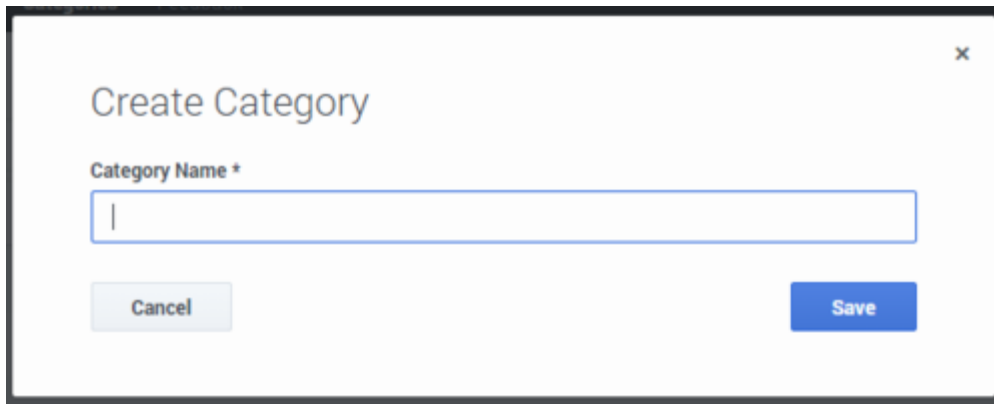
Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Categories**.
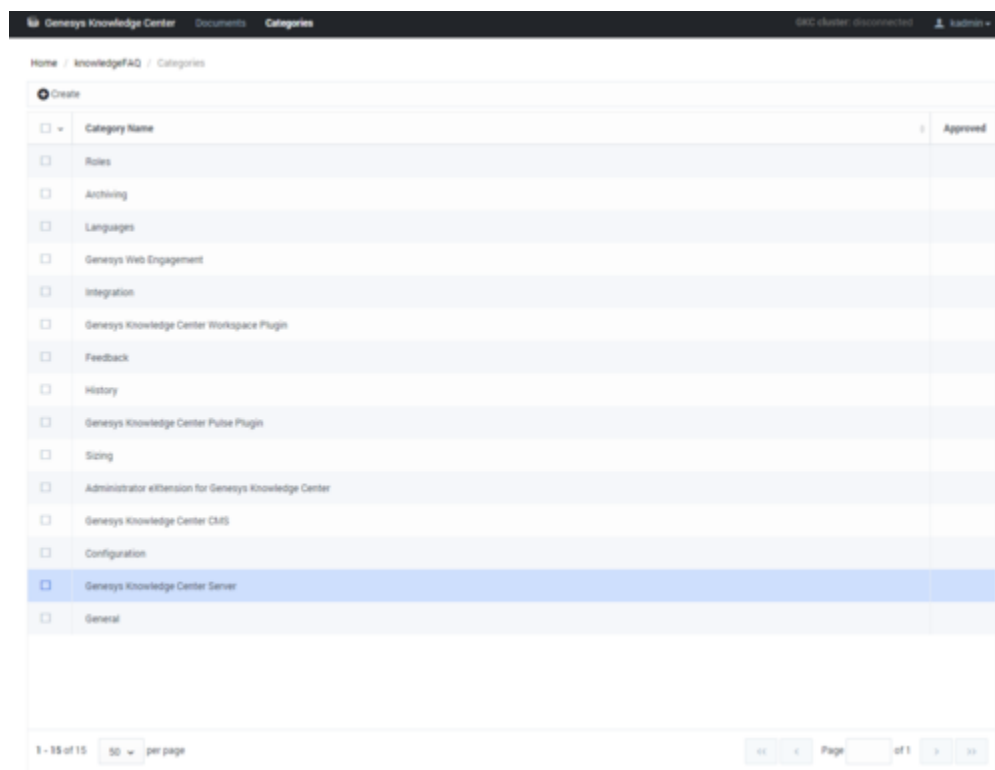
Selecting Knowledge Base Categories

3. Press the **Create** button.
4. The **Create Category** window appears.
5. Enter your category name.

Creating a Knowledge Base Category

6. Save your changes or cancel them, using the appropriate buttons.

End
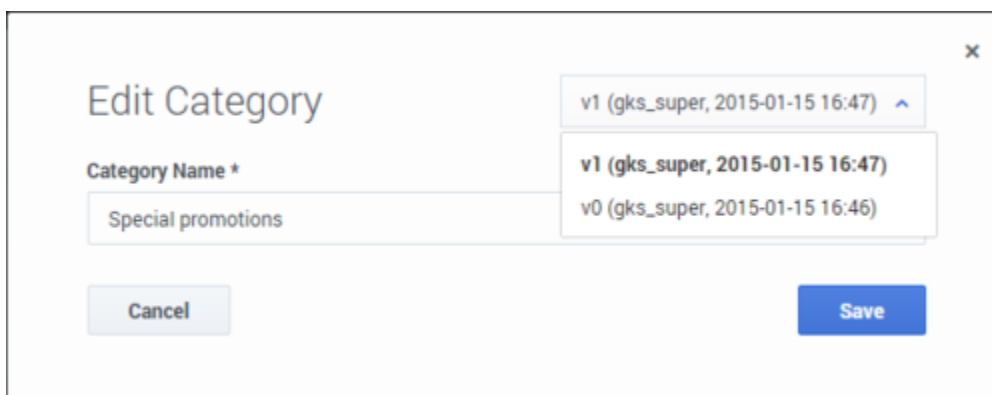
Viewing or Modifying a Category

Prerequisites

- The knowledge base has been defined in the CMS.
- The category has already been created.
- **Knowledge.CMS.Category.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Categories**.
3. Choose your category from the list and click the **Edit** button or double-click on the appropriate row.
4. The **Edit Category** window appears.

Editing a Knowledge Base Category

5. View or browse through the category changes history (using the drop-down with versions) or make changes in the category name.

6. Save your changes or cancel them, using the appropriate buttons.

7. Every time you make a change, a new version of the category will be created and the new version of the formerly approved category will be given a state of **not approved**.

End

Deleting Categories

Prerequisites

- The knowledge base has been defined in the CMS.

- The category has already been created.

- **Knowledge.CMS.Category.Author** privileges have been assigned to the user.

- A connection to Genesys Knowledge Center is available.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.

2. Click **Categories**.

3. Select one or more categories from the list.
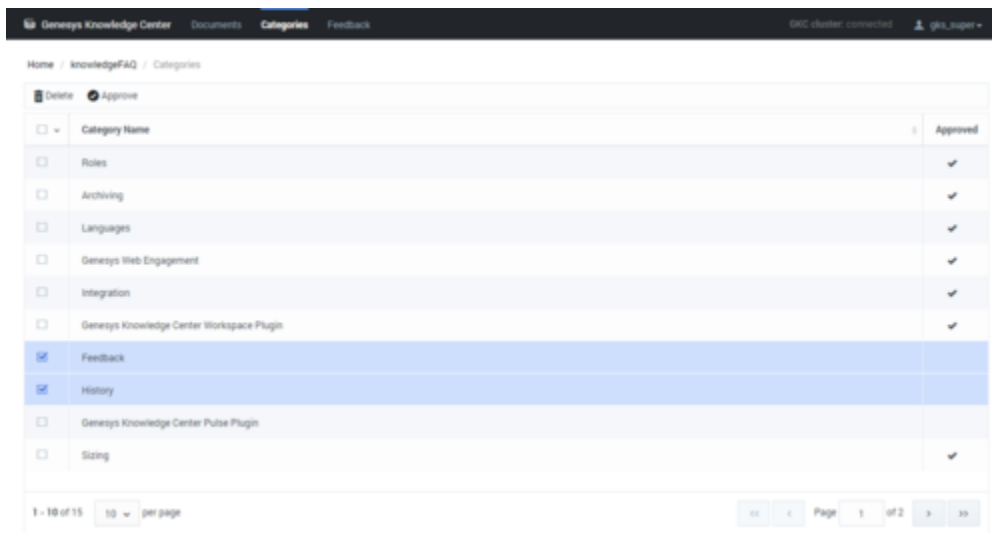
Selecting Categories in the CMS

4. Press the **Delete** button.

Deleting Selected Categories

5. Confirm your action in the pop-up.

End

Approving Categories

Prerequisites

- The knowledge base has been defined in the CMS.
- The categories have already been created.
- **Knowledge.CMS.Approver** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Categories**.
3. Choose one or more categories from the list.
4. Click the **Approve** button.
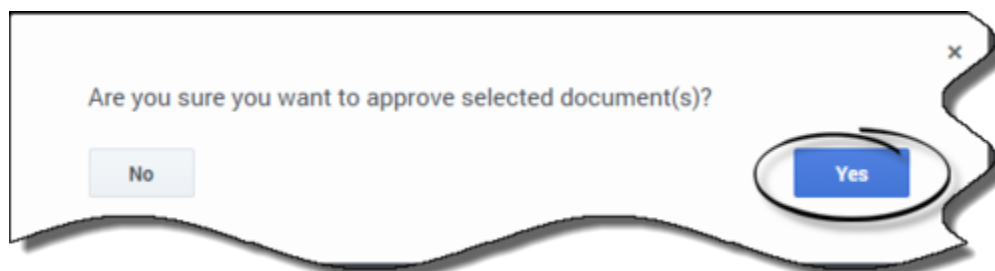
Approving Categories

5. Confirm your action in the pop-up.

End

Working with Documents

Creating a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

> ### Important
> The maximum size of attachments is 20MB.
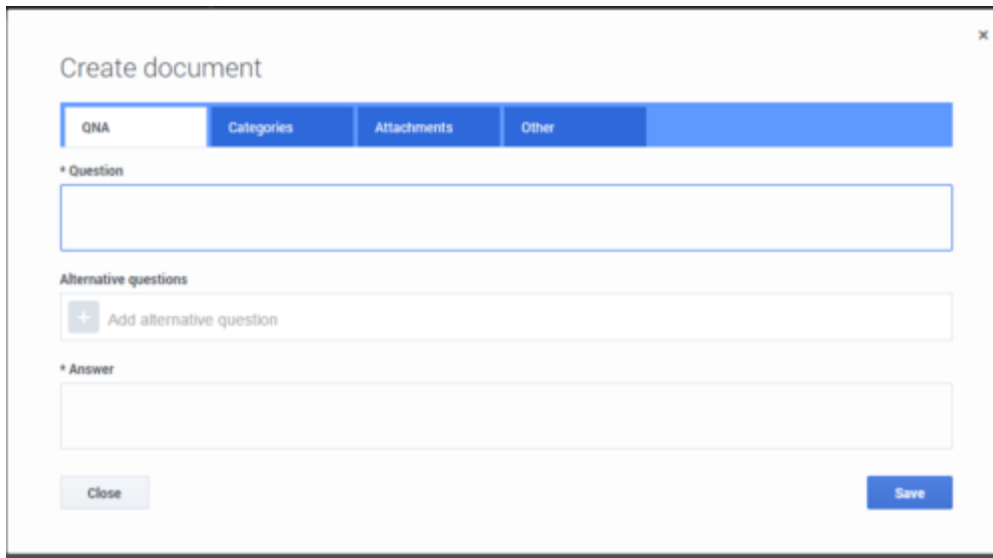
Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**; a list of documents appears.
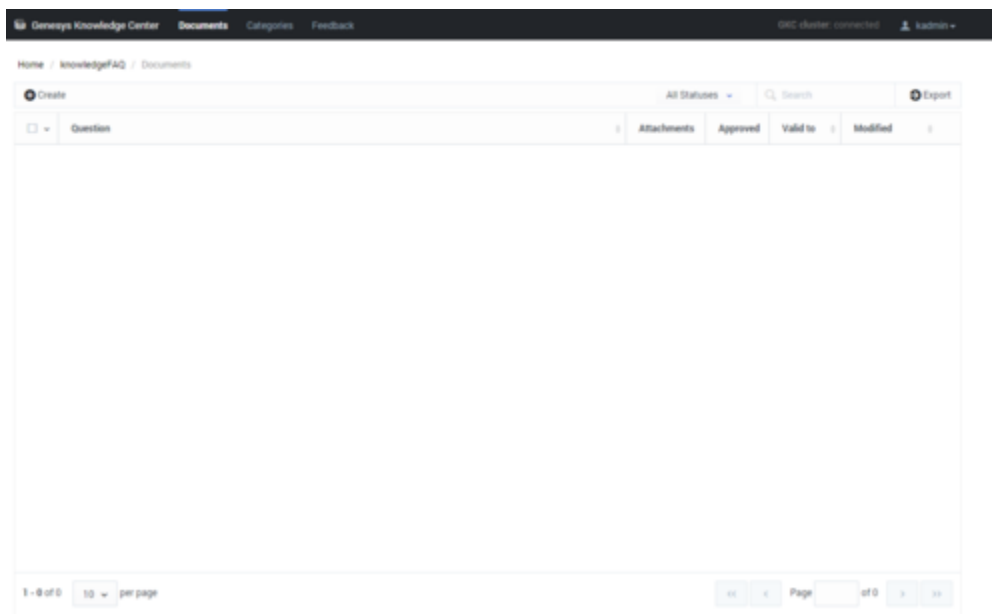
Listing Documents

3. Click the **Create** button; the **Create Document** window appears.
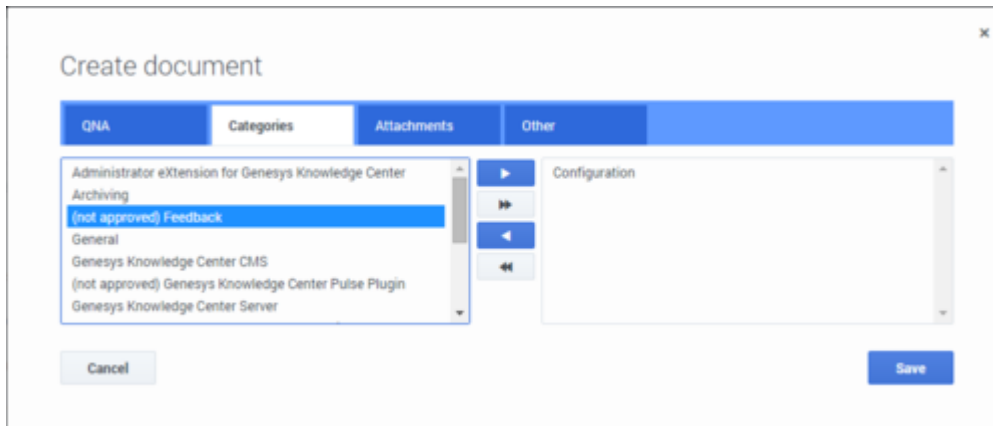
Creating a Document

4. Fill in the **QNA** tab by adding **Question** and **Answer** (required) and alternative wordings of the question (by pressing the **+** sign in the **Alternative questions** field).

5. Fill in the **Categories** tab by selecting the appropriate categories from the list on the left and moving them to the right.

Adding Categories to a New Document
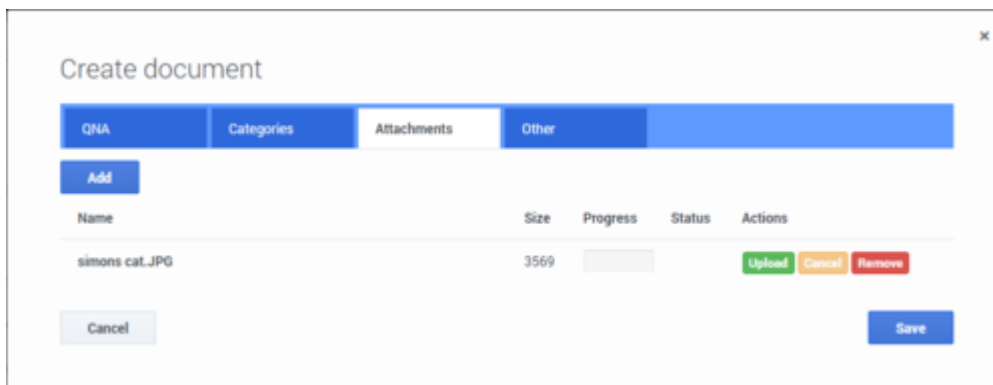
6. Fill in the desired **Custom fields** values.

Adding Custom Fields to a New Document

7. Add **Attachments** by pressing the **Add** button and then the **Upload** button. To remove attachments, press the **Remove** button.
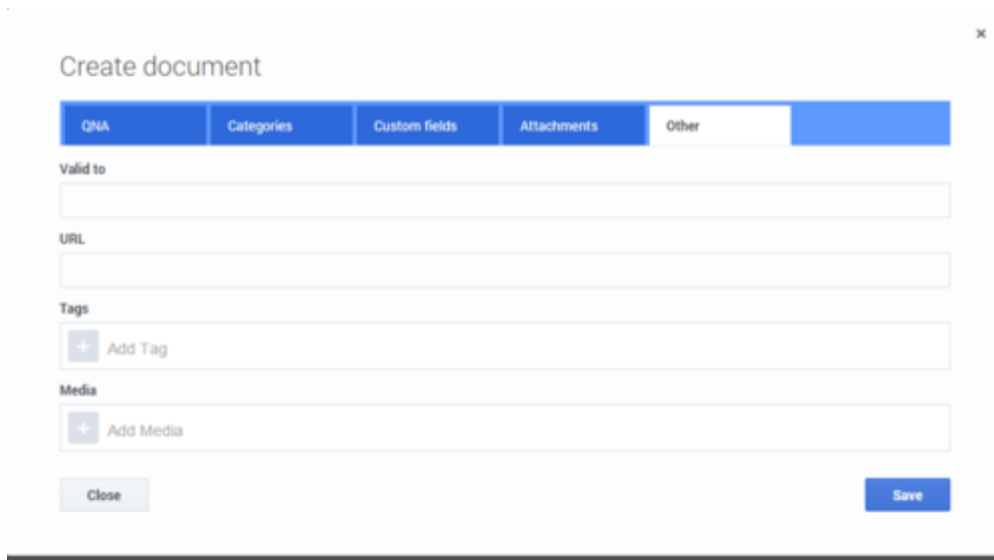
Adding Attachments to a New Document

> ### Important
> Maximum file size: 20 MB.

8. Fill in the **Other** tab, as needed.

Adding Other to a New Document

9. Save your changes or cancel them, using the appropriate buttons.

End

Viewing or Modifying a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The appropriate categories have been created.
- The Document has already been created.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**; a list of documents appears.

3. Choose a Document from the list and click **Edit**, or double-click the appropriate row.

4. View or browse through the category changes history (using the drop-down with versions), or make changes in the editor.

Editing a Document

5. Save your changes or cancel them, using the appropriate buttons.

6. Every time you make a change, a new version of the document will be created and the new version of the formerly approved document will be given a state of **not approved**.

Document Versions

End

Deleting a Document

Prerequisites

- The knowledge base has been defined in the CMS.
- The Document has already been created.

- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

> ### Important
> You cannot delete a document from the knowledge base on the CMS if Genesys Knowledge Center Server does not contain a knowledge base with the same name.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**.
3. Select one or more Documents from the list.
4. Click the **Delete** button.
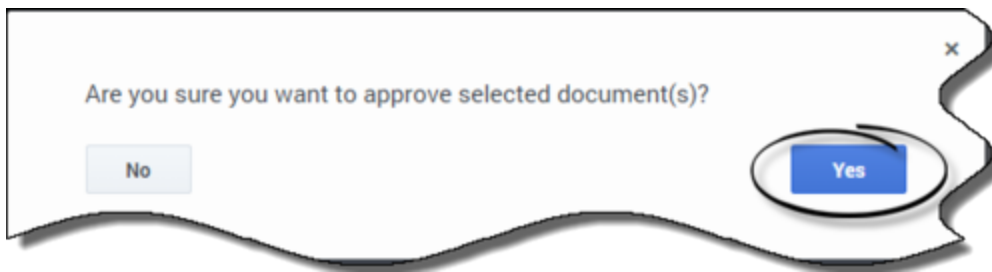5. Confirm your action in the pop-up.

Deleting a Document

End

Approving Documents

Prerequisites

- The knowledge base has been defined in the CMS.
- The Document has already been created.
- **Knowledge.CMS.Approver** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**.
3. Select one or more Documents from the list.
4. Click the **Approve** button.

Approving a Document

5. Confirm your action in the pop-up.

End

Exporting Knowledge base to Knowledge Center Server

Important

Only approved documents and categories will be exported to the Knowledge Center Server.

Prerequisites

- The knowledge base has been defined in the CMS.
- The categories have already been created and approved.
- Your Documents have been created and approved.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Approver** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Documents**.
3. Click the **Export** button; the **Export documents** window appears.
4. Choose the desired export mode in the pop-up and click **Export**; all approved documents from the CMS will be exported into Genesys Knowledge Center Server.
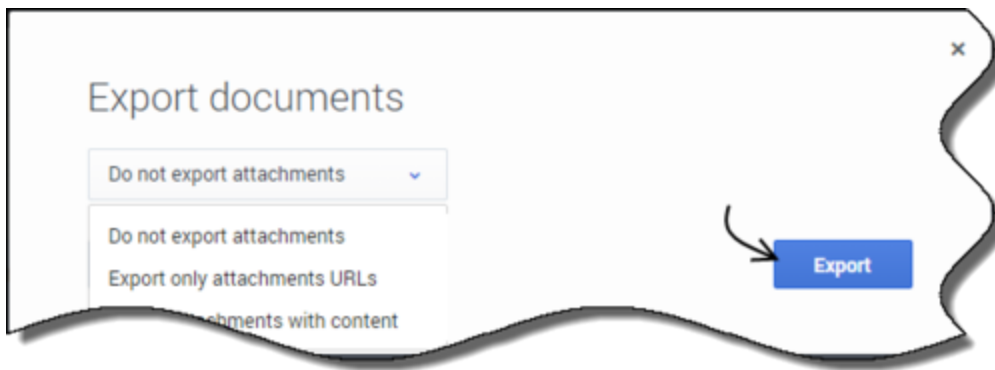
Exporting Documents
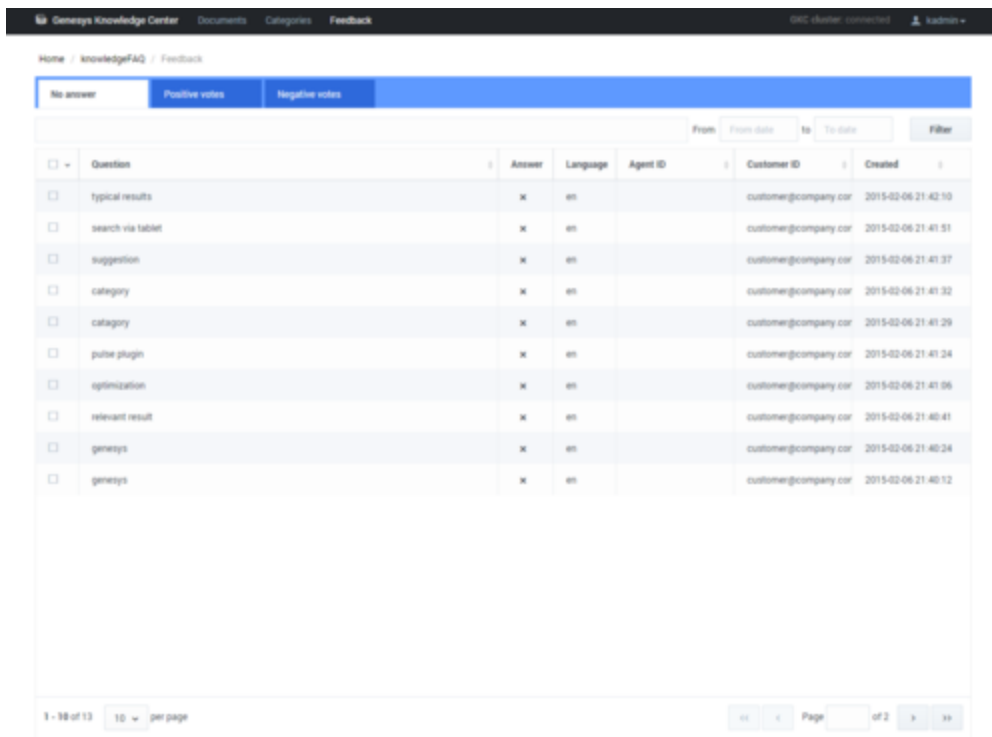
End

Working with Customer Feedback

Processing a "No answer" Item

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
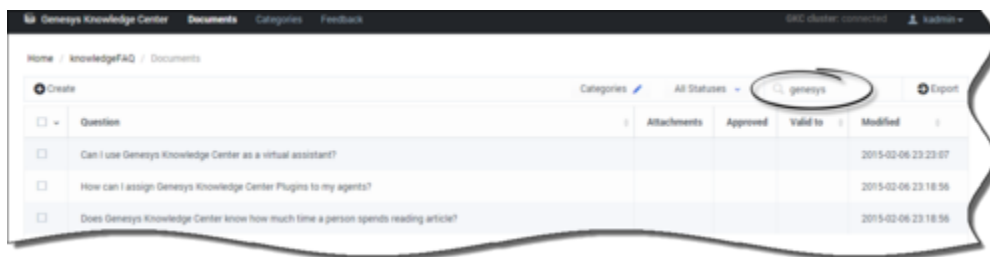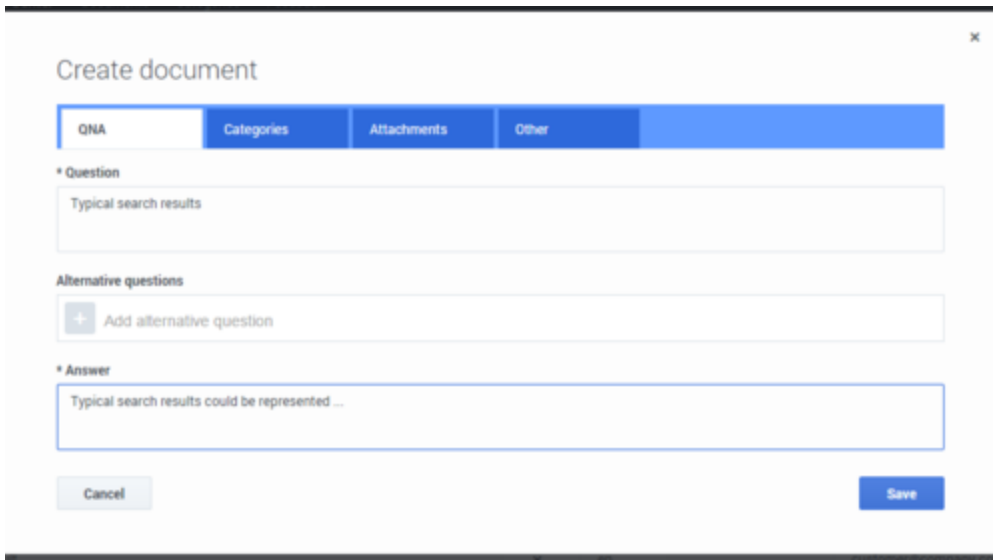2. Click **Feedback**.
3. Choose the **No answer** tab.

Processing a No Answer Item

4. Choose one or more items from the list.

5. Process each item:

   - Search for similar existing questions using the **Search** button.

   Finding Similar Questions

   - Click the **Create document** button and create a new document based on the **No answer** item.

Creating a New Answer

- Delete unnecessary items using the **Delete** button.

End

Processing Positive Votes

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Feedback**.
3. Choose the **Positive votes** tab.

Processing Positive Votes

4. Choose one or more items from the list.

5. Process each item:

   - Add a search query as an alternative question for the upvoted document using the **Add as alternative** button.

Adding an Alternate Question

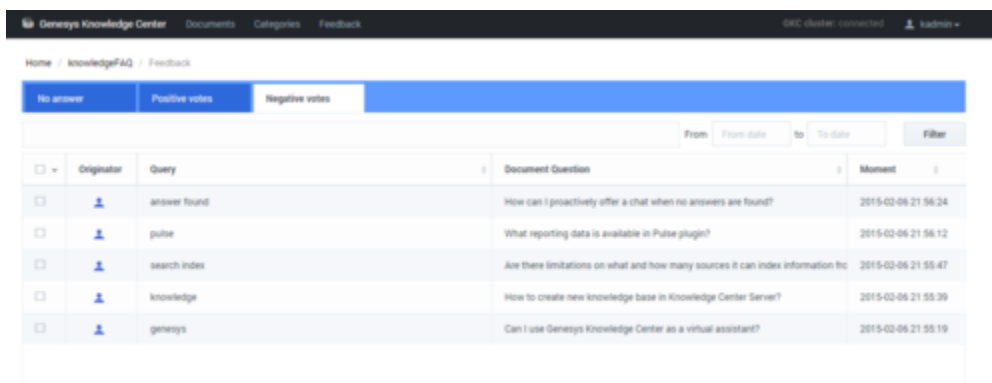- Delete appropriate items using the **Delete** button.

End

Processing Negative Votes

Prerequisites

- The knowledge base has been defined in the CMS.
- A connection to Genesys Knowledge Center is available.
- **Knowledge.CMS.Document.Author** privileges have been assigned to the user.

Start

1. Move your mouse over the appropriate knowledge base icon on the main page.
2. Click **Feedback**.
3. Choose the **Negative votes** tab.

Processing Negative Votes

4. Choose one or more items from the list.
5. Process each item:
   - Review or edit downvoted documents using the **Edit document** button.
   - Create new documents using the **Create document** button.
   - Delete appropriate items using the **Delete** button.

End

Using the Pulse Plugin

Overview

> **Important**
> 8.5.100.01 or higher required

Genesys Knowledge Center Plugin for Pulse plugin allows you to add knowledge-centric statistics to your existing dashboards.

Plugin provides 2 widgets:

- Dashboard: containing a set of pre–configured statistics that are embedded into the main pulse dashboards along with other measures of your environment.

- Expanded: Kibana-based widget that allows dynamic data discovery when you expand the widget.

To add widgets to your pulse dashboard please follow the steps described in the Deployment Guide.

Dashboard Widget

the Dashboard Widget provides a small component with major knowledge KPI that is embedded into the pulse dashboard along with other environment metrics and statistics. The Widget shows the information for a particular knowledge base within a specified period of time from now. KPIs shown on the widget are:

- Search – number of search requests executed

- Feedback - % of the search request that users provided feedback on

- Sentiment - % of 'like' feedback

- Confidence – average confidence of the first documents returned on the search requests

- Deflection- % of the search queries that end up with indication that no answer had been found

Pulse Plugin Displaying KPIs

Expanded Widget

When you expand the Knowledge Center dashboard Widget to the full tab mode you will see the Expanded Widget that allows data discovery and analysis within your cluster. The Widget is based on the Kibana and delivers all of its power for data analysis. The Widget consists of:

- Daily Trends by User Activity and Mean Confidence

Pulse Plugin Displaying Daily Trends

- Event Charts

Pulse Plugin Event Charts

- Top Trending Topics

Pulse Plugin Trending Topics

- Activity History

Pulse Plugin Activity History